DOCUMENT RESUME

ED 279 322 IR 051 792

| | |
|---|---|
| TITLE | Volunteers in Network Libraries: A Manual of Procedures. |
| INSTITUTION | Library of Congress, Washington, D.C. National Library Service for the Blind and Physically Handicapped. |
| PUB DATE | 86 |
| NOTE | 108p. |
| PUB TYPE | Guides - General (050) -- Viewpoints (120) |
| EDRS PRICE | MF01/PC05 Plus Postage. |
| DESCRIPTORS | *Library Networks; Motivation Techniques; Occupational Information; Program Administration; *Program Development; Program Evaluation; Program Guides; Recognition (Achievement); Recruitment; *Training Methods; *Volunteers; *Volunteer Training |

ABSTRACT

These guidelines for organizing and running a volunteer program in a network library were compiled from a variety of sources, including the 1980 National Library Service (NLS) evaluation of volunteer use, letters from network librarians, analysis of library newsletters, surveys, and personal interviews. Topics are covered under the following titles: (1) Planning Your Program (Evaluation of the Library's Needs, Organizational Preparation, Operational Planning, and Volunteer Handbook); (2) Recruiting (Planning Recruitment, Recruiting, and Dealing with Success); (3) Placement and Orientation (Interviewing and Placing, Orientation Planning, Staff Orientation, and Volunteer Orientation); (4) Training (The Training Plan, Structuring the Training Sessions, Training Staff Supervisors, Training Volunteers, and a Bibliography of Training Materials Available from NLS); (5) Management (The Management Plan, Steps for Successful Management, Management Guidelines, and a Bibliography of Management Materials Available from NLS); (6) Motivation; (7) Recognition (Expressing the Library's Gratitude, Volunteer Recognition, Staff Recognition, and You Are Responsible for Morale); and (8) Evaluation (The Challenge of Evaluation, Evaluation Planning, Evaluating Volunteers, and Evaluating the Program). A bibliography on volunteerism and sample job descriptions for a volunteer coordinator and seven volunteer jobs are appended. (KM)

**********
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
**********

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

This document has been reproduced as received from the person or organization originating it.

X Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

# Volunteers in Network Libraries: A Manual of Procedures

FD279322

IR051792

*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

[1986]



"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Hylda Kamisar

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

BEST COPY AVAILABLE

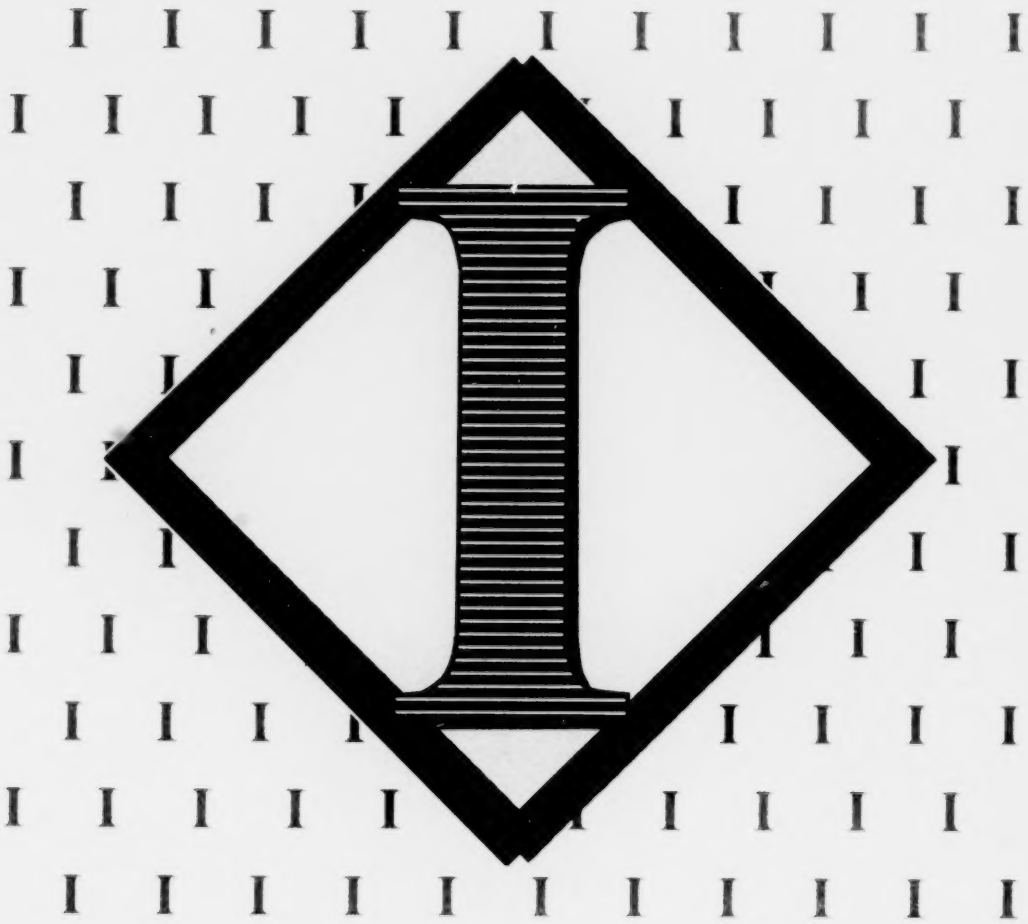
# CONTENTS


| | | |
|---|---|---|
| | **INTRODUCTION** | i |
| | THE GENESIS OF THIS MANUAL | i |
| | VOLUNTEER PROGRAM DEVELOPMENT: AN IMPORTANT INVESTMENT | ii |
| | THERE'S SOMETHING HERE FOR YOU | iv |
| 1. | **PLANNING YOUR PROGRAM** | 1 |
| | EVALUATION OF THE LIBRARY'S NEEDS | 1 |
| | ORGANIZATIONAL PREPARATION | 1 |
| | OPERATIONAL PLANNING | 6 |
| | VOLUNTEER HANDBOOK | 8 |
| 2. | **RECRUITING** | 12 |
| | PLANNING RECRUITMENT | 12 |
| | RECRUITING | 14 |
| | DEALING WITH SUCCESS | 18 |
| 3. | **PLACEMENT AND ORIENTATION** | 21 |
| | INTERVIEWING AND PLACING | 21 |
| | ORIENTATION PLANNING | 22 |
| | STAFF ORIENTATION | 24 |
| | VOLUNTEER ORIENTATION | 25 |
| 4. | **TRAINING** | 26 |
| | THE TRAINING PLAN | 26 |
| | STRUCTURING THE TRAINING SESSIONS | 27 |
| | TRAINING STAFF SUPERVISORS | 28 |
| | TRAINING VOLUNTEERS | 29 |
| | BIBLIOGRAPHY OF TRAINING MATERIALS AVAILABLE FROM NLS | 30 |

# CONTENTS


| | | |
|---|---|---|
| 5. | **MANAGEMENT** | 33 |
| | THE MANAGEMENT PLAN | 33 |
| | STEPS FOR SUCCESSFUL MANAGEMENT | 35 |
| | MANAGEMENT GUIDELINES | 42 |
| | BIBLIOGRAPHY OF MANAGEMENT MATERIALS AVAILABLE FROM NLS | 43 |
| 6. | **MOTIVATION** | 45 |
| 7. | **RECOGNITION** | 49 |
| | EXPRESSING THE LIBRRARY'S GRATITUDE | 49 |
| | VOLUNTEER RECOGNITION | 49 |
| | STAFF RECOGNITION | 59 |
| | YOU ARE RESPONSIBLE FOR MORALE | 60 |
| 8. | **EVALUATION** | 61 |
| | THE CHALLENGE OF EVALUATION | 61 |
| | EVALUATION PLANNING | 62 |
| | EVALUATING VOLUNTEERS | 66 |
| | EVALUATING THE PROGRAM | 68 |
| 9. | **APPENDIX** | 75 |
| | BIBLIOGRAPHY ON VOLUNTEERISM | 75 |
| | SAMPLE JOB DESCRIPTION: VOLUNTEER COORDINATOR | 78 |
| | SAMPLE JOB DESCRIPTIONS: VOLUNTEER JOBS | 79 |

# INTRODUCTION



*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

# INTRODUCTION

"The most powerful force on earth
is the spontaneous cooperation
of a free people."

-- Woodrow Wilson

## THE GENESIS OF THIS MANUAL

The concepts and recommendations in this manual were distilled from the advice and experience of network libraries across the country. Administrators and staff in libraries large and small described their experiences with running volunteer programs, including their management challenges, their creative approaches, their successes, and their mistakes. This wisdom was collected through a variety of mechanisms: the 1980 NLS evaluation of volunteer use, letters from network librarians recommending the content of the manual, analysis of library newsletters, surveys, and personal interviews.

Although this manual can guide the coordinator of a new volunteer program through the developmental process, it is more than a beginner's manual. What follows is a compilation of proven guidelines for organizing and running a volunteer program in a network library.

## VOLUNTEER PROGRAM DEVELOPMENT: AN IMPORTANT INVESTMENT

You can meet the challenge of providing enhanced service to your patrons with limited resources. At a time when the need for library services for blind and physically handicapped people is growing at a much faster rate than the funds available to support these services, the use of volunteers provides the means for continued growth in the field.

The most important dividend of initiating or expanding a volunteer program is also the most obvious: more work will be done and your patrons will be served better. Volunteers can free up personnel to work in creative directions such as developing new or enriched services and establishing more direct contacts with patrons. You can expand the range of services provided by your library by having volunteers take over the more routine jobs giving staff members time to concentrate on their own areas of expertise. Volunteers can bring books and equipment to new readers, to seniors, and to the homebound. And in many libraries, volunteer production of regional books and magazines supplements the materials available through the national service.

In addition, volunteers can provide technical assistance and specialized services not otherwise available to libraries. Many libraries work with the Telephone Pioneers and other machine repair groups, but there are other opportunities for the use of volunteers with special skills. Some libraries use volunteers with experience in fund raising to solicit donations and special grants for their programs. Others use volunteers with special skills for training new volunteers in the various aspects of book production.

A natural side effect of incorporating volunteers in the day-to-day operations of your library is the fact that members of the community become involved in and aware of your program. By opening your library to volunteers, you foster good will and assure valuable community support for the services provided by your library. Many libraries have benefitted from such widespread community support. Volunteers exude a level of enthusiasm, interest, and commitment that can be contagious. Motivated volunteers can become excellent promoters and publicists of your program.

Yet, despite the dividends described above, not all network libraries are making a major effort to implement or expand volunteer programs. Responses to a survey conducted in 1984 for DIKTA--a journal of the Southern Conference of Librarians for the Blind and Physically Handicapped--were overwhelmingly in favor of expanding volunteer programs, but you should be aware of the most common reasons for not doing so. In some areas, state or local laws do not permit the use of volunteers. But for those libraries that do not face legal barriers to using volunteers, the most common reason for not expanding their programs was the lack of staff time available for overseeing the day-to-day operations of a volunteer program. Ironically, this reason was also frequently used as a justification in favor of expanding the use of volunteers by libraries that currently have large programs. There is considerable time and expense involved in running a volunteer program, but in the long run it is worth the investment.

Return-on-investment figures for the majority of volunteer programs nationwide show that using volunteers is cost-effective. Government agencies, private businesses, and non-profit organizations are all discovering the merit of using volunteers. The range of services provided to these organizations by volunteers is expanding rapidly. In 1985, for example, 16.1 billion hours of volunteer time were contributed nationwide. The dollar value of this time was estimated to equal $110 billion for the year!* Volunteers are a very valuable human resource, and most libraries recognize the contribution they can make.

There are increased administrative responsibilities especially when a program is just getting started. However, you can train volunteers to take over many of these administrative responsibilities with proper supervision.

* These figures are from "Americans Volunteer 1985," an Independent Sector Survey conducted by the Gallup Organization.

Many libraries have found that the bigger the program is, the more flexible the day-to-day management can become. Volunteers themselves can be trained to handle much of the work involved in running the program. Besides providing administrative support, volunteers can be trained to supervise and to train other volunteers. The fact that there is work involved in maintaining an efficient volunteer program cannot be denied, but keep in mind that developing and running a volunteer program is a satisfying and creative endeavor despite the hard work involved.

## THERE'S SOMETHING HERE FOR YOU

Although programs vary a great deal, aspects of running a volunteer program are the same, regardless of its scope or size. Thus, the concepts this manual contains are organized into chapters on planning, recruiting, placement and orientation, training, management, motivation, recognition, and evaluation. The extent to which you use each chapter, will depend on the numbers of volunteers you have now or intend to have in the future. Choose from this manual those concepts that address your unique situation and build upon them. Only you know the resources available to you and what best applies to your program.

### If You're Just Getting Started . . .

This manual has done some of the initial work for you. Begin with Chapter 1, Planning Your Program. This preview provides guidelines for assessing your library's needs, and gives advice on preparing your organization and doing the operational planning vital to the creation of an efficiently run program. Chapter 1 contains some tools as well: a sample outline for a volunteer handbook and a comprehensive chart diagramming planning decisions for each step of the program.

The remaining chapters will enable you to anticipate the steps of program development. The planning chart will give you an overview of each step. Start small and build your program as you gain experience and develop resources.

## If You Use Volunteers in a Limited Capacity . . .

Your experience may have motivated you to expand into other areas. Evaluate your current program and volunteers (see Chapter 8), and determine what other tasks volunteers can do in your library. Have current volunteers help with your expansion and take on different jobs in new areas. Then recruit more volunteers to take their places.

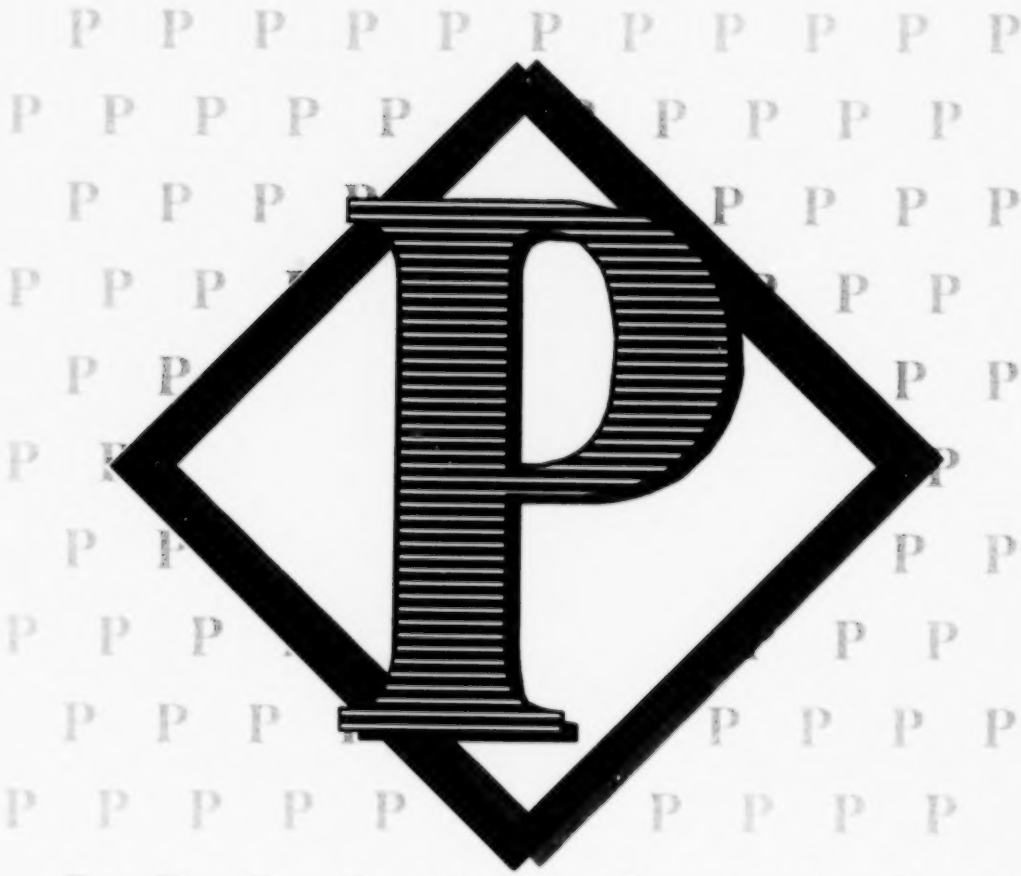
If you need suggestions on how to attract new volunteers, read Chapter 2 on recruiting. This chapter describes how to plan for recruitment, how to develop your own recruitment materials and activities, and how to handle responses to your recruitment. A sample volunteer application form and a sample volunteer service agreement are included. These can be adapted for your special needs or used "as is." You may also want to explore the use of volunteers with technical expertise or special skills as suggested throughout the manual.

## If You Have a Thriving Program . . .

Congratulations! You've probably discovered how rewarding administering a volunteer program can be. You've also discovered that each step in a successful program depends on the others. From planning to evaluation, every aspect of your program is functioning year-round. So if you're planning to hold training sessions for a new group of volunteers next month, read over Chapter 4. You may find that there are some aspects of training you haven't fully explored. We hope you can find some fresh and useful ideas in this compiled wisdom from network libraries nationwide.

# PREPARATION & PLANNING 1





*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

## 1. PREPARATION AND PLANNING

Planning is the most important phase in the development of a successful volunteer program. The length and formality of the planning stage depend upon the size of your program. Time spent before initiating a new program or before expanding an existing one will pay off both in the long and short run. A well-structured program is one designed to solve problems before they start.

Three steps are involved in planning a working, growing volunteer program: (1) Evaluation of the Library's Needs, (2) Organizational Preparation, and (3) Operational Planning. A fourth initial step is the preparation of a volunteer handbook that will be ready when you begin or renew recruitment efforts. These four steps are discussed in the sections that follow.

### EVALUATION OF THE LIBRARY'S NEEDS

Before planning a volunteer program, evaluate the need for one with administrators and other library staff. Analyze some simple questions together: what tasks would you like to do regularly but only do occasionally, when you find the time? What tasks would you like to initiate, but can't because of lack of time? Which tasks would be appropriate for a volunteer to do with proper direction and supervision?

Once you've established the need for volunteers, determine how many you need, with whom they should work, and what skills they should have. This needs evaluation can also show you how and where volunteers can enhance the services of your library.

### ORGANIZATIONAL PREPARATION

Organizational preparation can minimize the need for troubleshooting after your program gets underway. Consider potential resistance to the program and anticipate possible problems before they arise.

## Background Information

The first step in organizational preparation is to gather fundamental information about regulations, practices, and attitudes in your community that could affect your volunteer program.

### Check State and Local Regulations

Carefully review state and local regulations pertaining to volunteer programs. This step may be confusing and frustrating for anyone who isn't familiar with "legal-ese." The best way to approach this problem is to get in touch with legal counsel representing the library agency.

### Examine Insurance and Liability Policies

In some cases, once people are registered as volunteers with the state or local government, they are considered unpaid government employees. As such, they are afforded liability insurance under the same policies that pertain to state employees. In other cases, volunteers must be covered under their own individual policies. Once again, an expedient way to answer questions about insurance coverage is to contact legal counsel or the appropriate authorities.

### Note Concerns of Unions and Women's Rights Groups

Some unions and women's rights groups object to the use of unpaid workers. Be aware of and sensitive to these concerns. Check with other groups in your community that use volunteers to ascertain local attitudes. Also, check with your legal counsel for local labor policies.

### Explore Other Resources

Contact your peers, fellow librarians on both the network and local library levels, and volunteer coordinators in local service organizations for help and information. Do they currently have a volunteer program? Seek their advice to find out what works in your area and what doesn't.

### Use Voluntary Action Centers

Large metropolitan areas often have organizations that provide information, match volunteers with programs, and generally serve as a resource for those interested in volunteer activity. Known as volunteer centers, voluntary action centers, or volunteer clearinghouses, they can provide much valuable information. Look for one in your locality. Its staff may be able to help you find the specialized expertise you need for certain volunteer efforts.

## Program Development

Work with administrators, staff, and any current volunteers to determine the most effective use of volunteers in the library. To do this you will need to be familiar with library resources, the number of patrons served, and types of expansion needed.

### Seek Endorsement from Administrators

Getting the approval and support of top managers is vital to the success of your volunteer program. Their positive endorsement can inspire the entire volunteer effort. Whether you are initiating or expanding your volunteer program, take the time to educate administrators about the advantages and successes of volunteer assistance. Remember that they must respond to others within your organization and the larger community; senior managers cannot wholeheartedly promote your plans unless convinced of their merit. Furthermore, administrators sympathetic to the volunteer program can be invaluable allies when the library's budget is discussed and allocated.

NLS has published a report that can provide you with recommendations and statistics for use in planning and justifying volunteer programs to administrators. Entitled An Evaluation of Volunteers in the National Library Service for the Blind and Physically Handicapped (ERIC DOCUMENT NUMBER ED 197731), the publication is the final report of a study conducted by Applied Management Services for NLS. Contact your network consultant for a copy of the report.

### Cultivate Staff Support

Communication is everything. By carefully consulting library personnel about volunteer involvement in various aspects of the work, you help to build positive attitudes among staff toward the volunteer program. Volunteer managers who keep staff members informed as much as possible about the volunteer program report that the program enjoys more success as a result. Encourage staff participation. Then you can select the more supportive of your co-workers to help coordinate and supervise volunteers and volunteer activities. Also, anticipate what techniques you will use to deal with potential conflicts between staff and volunteers, such as volunteer reassignment.

**Define Program Goals**

Set realistic goals for your volunteer program and jot them down so you can keep the program on target. At this point, you don't need an elaborate report, just a simple statement of your goals in terms of service to patrons. For example:

- "I want to improve service to the visually and physically handicapped readers served by my library by initiating a tape and disc inspection program operated by volunteers."

- "I want to use volunteers to establish a taping or brailling program to supply readers with titles not available through the national service."

- "I want to improve service by initiating a clerical support system using volunteers to expedite service to patrons."

-or-

- "I want to increase the number of patrons served by the library by ____ in the first year of my volunteer program."

**Articulate Volunteer Policy**

Develop a clear policy for volunteers, using staff employment policies as a starting point. Try to strike a balance that will foster a team spirit between staff and volunteers. Be wary of any deviations between policy for staff and policy for volunteers that appear preferential to either side. Be sensitive to the potential conflict between "responsible because you're paid" vs. "due rights because you volunteer." Both staff and volunteers have rights and responsibilities that should be sensitively adjusted to their respective situations.

Volunteer policy must be recorded so that it never appears arbitrary. Include basic policies in your volunteer handbook. (A sample handbook outline appears at the end of this chapter.) This policy must be vested with considerable authority, as it should guide related staff and volunteer activity. However, policies should be reviewed periodically and revised if appropriate. Staff response is a sensitive indicator of the need for such revision.

**Write Job Descriptions**

Develop job descriptions for each of your volunteer positions even if you don't think you will fill the positions immediately. Use the information obtained from your survey of staff needs to determine what the volunteer jobs should be and which positions should be filled first.

To increase motivation and encourage commitments, volunteers should understand that they are performing necessary tasks. Job descriptions should highlight the importance of each position in providing better service to patrons. (Sample job descriptions for volunteer coordinator and for various volunteer positions can be found in the appendix.) The following information should be included in each job description:

- Job title
- Brief description of task involved
- Detailed description of volunteer duties
- Minimum hours required--per week or per month--if applicable
- Special qualifications needed, if any
- Special training needed, if any
- Staff supervision needed/supervisor appointed to volunteer position

**Forge Relationships with Other Volunteer Groups**

Introduce yourself to various local and national volunteer groups such as book production groups, your local United Way, and others that can help you with your planning. Develop sustaining relationships with these groups and keep them informed on your progress. They will prove invaluable through every stage of your program development. See Chapter 2 on recruitment for a list of organizations.

Some organizations, such as the Telephone Pioneers of America, volunteer clearinghouses, and local civic and church groups supply large numbers of volunteers to libraries for group projects. If you intend to use large groups, part of your plan should be to establish a simple statement of operating guidelines for working with them. Establish yourself as the point-of-contact in the library for the volunteer group. Have the group appoint a contact person to represent them.

## OPERATIONAL PLANNING

The operational planning of your program consists of writing a brief action plan. A good operational plan should include the elements discussed in the sections that follow.

### Design Record Keeping

Record keeping does not have to be elaborate or time consuming, but you should keep tallies which can later be used for volunteer recognition as well as for justification of expenses and budget requests. Most libraries keep track of the hours contributed by volunteers each year. Many libraries also keep track of each volunteer's mileage, so the volunteer can claim an income tax deduction (under present laws). And you'll want to keep track of what volunteers do over a year, such as record "X" number of magazines, inspect "X" number of discs, or repair "X" number of machines. These figures show the benefits and results of your volunteer program.

### Discuss Supervisory Responsibilities of Staff

All staff members should be given an opportunity to say where they can or will fit into the structure of the volunteer program. Staff members who supervise volunteers often receive credit for supervisory work which can lead to personal advancement.

### Develop a Realistic Budget and Controls

Some network libraries have a separate budget for expenses of the volunteer program. Others incorporate volunteer expenses into the library's main budget. Whatever the case, it is important to develop a budget that anticipates all expenses of the volunteer program. Volunteers will need office supplies and working materials. Remember to include these basic necessities in your budget, as well as other expenses such as developing and reproducing materials for recruitment, orientation, training, and recognition. Any provisions in the budget for volunteers will later be justified by the amount of work performed by them.

### Plan Space, Equipment, and Supply Needs

Volunteers should be comfortable working in the library. If you take the time to assure that the volunteers are provided for, they will know their efforts are recognized. Many libraries have a special area set aside for volunteers to work in, where they are provided with coffee, tea, and other refreshments.

## Carefully Weigh the Evaluation Process

The criteria for evaluation of the entire program and of the individual volunteer should be developed and agreed upon in the planning stage. To ensure fairness, these criteria should be developed before you begin recruiting volunteers. Volunteers could be evaluated on the basis of criteria like attendance, accuracy, and neatness of work, just as employees are. The volunteer program should be evaluated against the goals initially set for the program. How close did the program come to achieving the goals you set originally?

## Allow for Revision and Fine-Tuning

Set a date for revising the program after you have conducted the evaluations. Compare the successes of your program with your initial goals. Figure out what worked in your library and what didn't. Set new goals for your program and streamline your efforts.

## Create a Schedule

Develop a schedule for all the various phases of your program, and the frequency with which each should occur; for example, annually, semi-annually, quarterly. A sample checklist for volunteer program operations can be found at the end of this chapter. It will help you plot the various aspects of your program on a time line or calendar.

## Devise a Contingency Plan

Develop a back-up system for vital aspects of the program. What happens should the volunteer coordinator take a vacation or extended leave? Who are the back-up supervisors for the volunteers if the regular supervisors become ill?

## Plan for Other Components of the Program

Your plan should also include the components of the volunteer program as described in the following chapters. They include recruiting, placing and orienting volunteers, training, managing, motivating and recognizing volunteers, and evaluating the volunteer program and the volunteers. At the end of this chapter is a fold-out chart diagramming planning elements for each of these aspects of your program. Concentrate on the first several questions initially and add elements as your program expands.

## VOLUNTEER HANDBOOK

Develop your volunteer handbook during the program's planning stage. Creating the handbook will help solve problems with policy before you begin recruiting volunteers. The handbook will also help streamline your placement and orientation of volunteers. Make certain that the library staff has the opportunity to make significant contributions to the volunteer handbook.

Look through your staff employee manual and see what can be adapted and incorporated into the volunteer handbook. Imagine yourself as a newcomer to the network library system and to your library. What would you want to know? Indeed, a question and answer format based on this type of analysis is often very effective.

The following is a sample outline of a volunteer handbook. You can adapt it to fit your own program.

**Introduction**

- Acknowledgements
- How to use this handbook

**Overview of Library Operations**

- History
- Organization
- Services
- Funding

**Volunteer Program**

- Volunteers and their services

  -- development of the program
  -- program goals

- Administration of the program

  -- tape production
  -- braille production
  -- administrative support

- Administrators

  -- volunteer coordinator
  -- staff

**Policies and Procedures**

- Library policies

  -- location and hours
  -- floor plan
  -- emergency exits
  -- rest rooms
  -- parking
  -- telephones
  -- breaks
  -- smoking policies
  -- holidays
  -- appropriate dress

- State/federal policies

  -- insurance
  -- liability
  -- confidentiality
  -- tax deductions

- Program policies

  -- recruitment
  -- interview and placement
  -- orientation
  -- training
  -- scheduling
  -- recognition
  -- volunteer evaluation
  -- record keeping

**Volunteer positions**

**Terms and definitions**

SAMPLE CHECKLIST FOR
VOLUNTEER PROGRAM OPERATIONS

The following are the major activities that occur in most volunteer programs. These activities should be plotted on a time line or planning calendar according to the needs of your program.

___ Gain approval from administration

___ Prepare staff

___ Start recruitment

___ Interview and place volunteer recruits

___ Hold first orientation

___ Resume recruitment effort

___ Schedule volunteer shifts

___ Begin training

___ Complete training

___ Get volunteers started on the job

___ Evaluate training

___ Incorporate evaluation responses into new orientation and training sessions

___ Hold second orientation

___ Recognize volunteers formally

___ Evaluate volunteers

___ Evaluate volunteer program

___ Conduct evaluation of Volunteer Coordinator

SAMPLE COMPREHENSIVE PLANNING CHART (1)

## PLANNING RECRUITMENT

- What jobs need filling?
- How many recruits are needed to start?
- How often do I need to recruit?
- When shall I start?
- What skills are being sought?
- What organizations can I use?
- What are my specific recruitment goals?
- How regularly must recruitment take place?
- How much do I know about attrition rates?
- How will recruitment affect orientation and training?
- How can I respond quickly to recruitment success?

## PLANNING PLACEMENT AND ORIENTATION

- What are my placement and orientation goals?
- What percentage of successful candidates can I expect?
- How will I conduct interviews?
- How will I organize interview findings?
- How will I notify successful and unsuccessful candidates?
- How can I involve staff in orientation planning?
- How much work and attention do staff need before orientation?
- How far in advance should I prep staff for the orientation?
- Who will deliver the program and/or participate?
- How many people should I orient the first session?
- What will be the agenda?
- When will the first orientation take place?
- How can I tie orientation to recruitment and training?

## PLANNING TRAINING

- What jobs require training?
- What is the deadline for the first training materials?
- How soon after placement and orientation should the first training sessions take place?

SAMPLE COMPREHENSIVE PLANNING CHART (2)

- What advice do experienced volunteer workers have about content, approach, techniques?
- How often should training be scheduled and when?
- How extensive must training materials be?
- Who will prepare these materials?
- What training materials are already available?
- How can I incorporate training evaluation into training design?
- How can effective training techniques be tailored to specific tasks?
- What approaches are best for teaching trainers?
- How should the training sessions be structured?
- How soon can I begin teaching volunteers to train others?

MANAGEMENT PLANNING

- Can my volunteer management plan be based on staff management techniques?
- What records must I keep?
- What resources can I use to develop my volunteer management strategies?
- Will the management plan be complete by the time the first volunteers come on board?
- Have I devised good channels for volunteer/staff communication?
- Are mechanisms for resolving touchy volunteer situations planned?
- Has the ultimate use for records been determined?
- Are record keeping mechanisms efficient and effective?
- Have the legal requirements of record keeping been ascertained?
- Will my record-keeping techniques help when it comes time to evaluate the program?

MOTIVATIONAL PLANNING

- Do I understand how volunteers are motivated?
- Have I built motivational aspects into my management techniques, training, and recruitment efforts?
- Has motivation been planned to start with the first new volunteer?

SAMPLE COMPREHENSIVE PLANNING CHART (3)

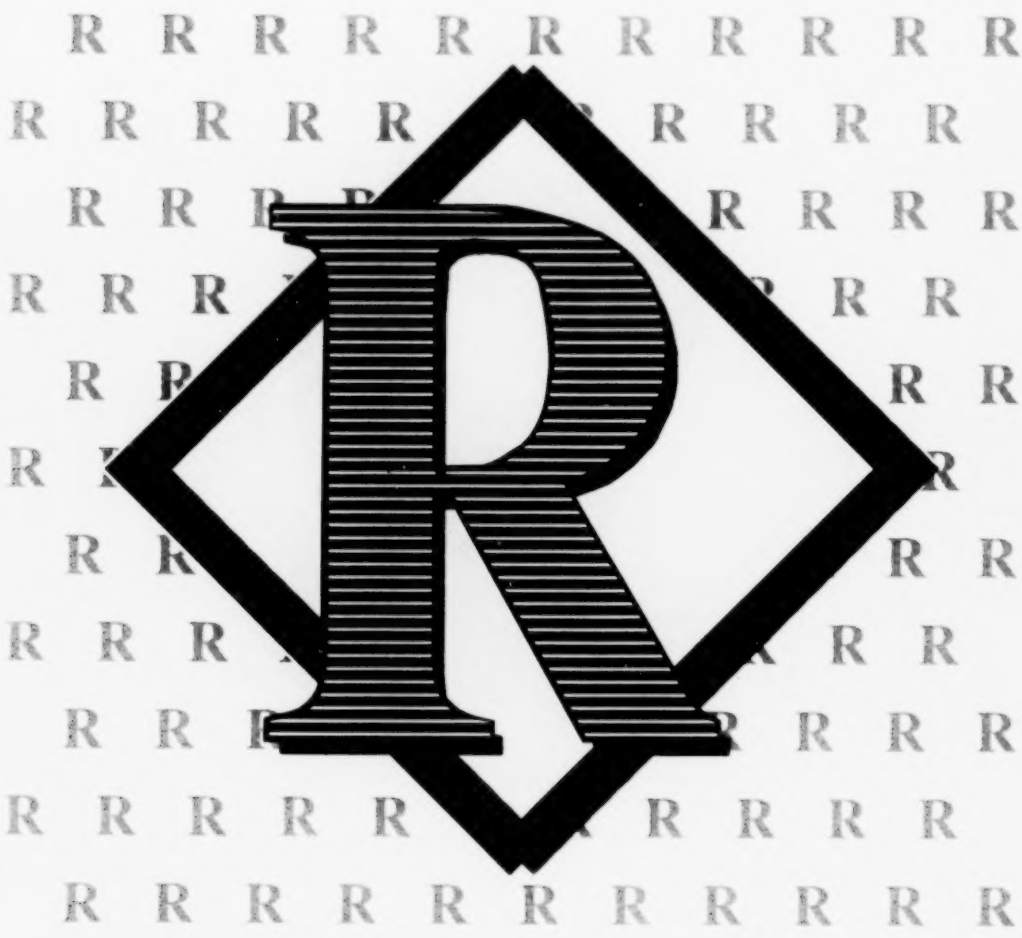
## PLANNING RECOGNITION

- What will be the rewards for the volunteers?
- How can I institutionalize informal recognition to make sure it happens?
- How can we remember to recognize staff as appropriate?
- When will we conduct our annual recognition event?
- At what minimum number of hours should volunteers be rewarded?
- Where should the breaks be for various levels of service?
- How can we devise the breaks to make a reward system that is fair, durable, and thrifty?
- What types of certificates, pins, etc., would be suitable and affordable?
- How much money can we afford to spend for an annual party?
- What kind of superlative service can be aspired to over 2 or 3 years? What will this award be?
- How can staff be convinced to provide positive feedback and grateful gestures?
- How can staff who promote the volunteer program be "boosted" to their superiors?

## PLANNING EVALUATION

- What are my program goals?
- What should I evaluate?
- Who should be involved?
- What standards should I use to measure success?
- How can evaluation findings be incorporated into the program planning?
- When should formal evaluation take place?
- How often should success be mentioned throughout the year?
- How can evaluation be kept positive and non-threatening?
- How can the evaluation plan be formulated in a useful way?
- How is evaluation to be publicized?
- How can findings be packaged so that they are useful and palatable?
- How can volunteers contribute to program evaluation?
- How is the volunteer manager to be evaluated?
- Should patrons be included in evaluation activities?

# RECRUITING 2





*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

## 2. RECRUITING

Recruitment activities do more than bring in volunteers: they also publicize your program. By advertising for volunteers, you heighten public awareness of network library services. This increased visibility may even draw some new readers to the library as well.

Chapter 2 addresses the three steps in recruiting: (1) Planning Recruitment, which is essential to orderly success; (2) Recruiting, which concerns the techniques you might use; and (3) Dealing with Success, which discusses the ways you can handle responses. Some sample forms are also included at the end of the chapter.

### PLANNING RECRUITMENT

Once again, the key to a good program is a good plan. Your plan should include the following: volunteer profiles, sources of volunteers, recruitment goals, recruitment schedule, and plans for coordinating recruitment with other program components.

#### Develop Volunteer Profiles

Use the information you gathered in the planning stage about the jobs that need to be done in your library to determine how many volunteers you need. Then look at the job descriptions you've developed to determine what, if any, special skills certain volunteers should have. Do this well in advance of undertaking recruitment activities.

The techniques and resources you use to recruit depend on the number and special skills of the volunteers you need. For example, if you are starting a cassette and disc machine repair program, you will want to contact the Telephone Pioneers of America or local industry. But if you want a dozen volunteers for clerical support, you may only have to recruit through local civic groups.

Recruit only to fill the volunteer jobs you need initially. You can always expand your recruitment program later, as needed. However, your program should be flexible enough to make room for volunteers with special skills.

## Investigate Sources of Volunteers

Seek advice on your recruitment plan from both national and local organizations that use volunteers. National volunteer organizations and other national organizations with a history of community service projects can provide invaluable support and resources for your program. Many have on-going recruitment programs and some may even be able to supply you with volunteers. Local organizations and independent volunteer organizations such as the Telephone Pioneers may be able to provide support for special services such as machine repair or group projects like folding newsletters.

- National Volunteer Organizations

  -- Association for Volunteer Administration
  PO Box 4584
  Boulder, CO 80306

  -- Volunteer--The National Center
  1111 N. 19th St., Suite 500
  Arlington, VA 22209

  -- Retired Senior Volunteer Program
  806 Connecticut Ave., N.W., Room M-1006
  Washington, DC 20525

- Local Organizations

  -- Civic groups

  -- Local chapters of national organizations such as the American Association of Retired Persons and the Lions Club

  -- Local colleges and universities

  -- Public and private secondary schools

  -- Religious organizations

- Telephone Pioneers

  -- The Telephone Pioneers of America is a nationwide group of active and retired telephone industry employees with a long history of service to libraries for visually and physically handicapped people. Members of this organization have donated their time to the repair and maintenance of talking-book cassette and disc players and can provide invaluable technical assistance to library services. Telephone Pioneers can also provide clerical and administrative support.

## Define Recruitment Goals

Write a brief statement defining your goals for the recruitment program. For example:

- "I anticipate ___ responses to my recruitment efforts in the first month."
- "I want to recruit ___ volunteers with special skills."

-or-

- "I want to contact ___ local or national organizations to aid in my recruitment program."

## Schedule Recruitment Activities Regularly

Recruitment should be considered an on-going project. Volunteers leave the area, get other jobs, and start families, so you should have a plan to maintain your pool of volunteers. Planning should always be done in advance of the recruitment need, so you must anticipate your needs and think ahead. Once you have a thriving volunteer program, your volunteers themselves can become your best recruiting resource. However, a formal recruitment program should be conducted on a calendar basis. How often you recruit--quarterly, semi-annually, or annually--depends on the size of your program.

## Coordinate Recruitment with Orientation and Training

To allow for prompt handling of responses to your recruitment efforts, you should coordinate recruitment with orientation and training schedules. Volunteers should be made to feel that you care about getting their help and are well equipped to deal with them. Prompt and conscientious attention should be given to the reply cards from the volunteer brochure, "Volunteer at Your Braille and Talking-Book Library," or any other recruitment materials you have distributed.

# RECRUITING

## Carefully Design Your Recruitment Message

The recruitment message should clearly and succinctly describe your library and how volunteers help provide services for visually and physically handicapped people. When developing your message, try to answer the questions you are asked most often about volunteering at your library.

- Who? Describe the people you serve, for example: "There are _____ people in our community who read braille and recorded books and magazines instead of conventional print."

- Where? Identify your library and the area it serves.

- What? Describe the program in general, for example: "Our library circulates braille and recorded books, as well as the playback equipment used to enjoy them, to eligible readers in the _____ area. Eligible readers are visually and physically handicapped people who can't read or handle conventional-print materials. The tax-supported talking-book program is administered nationally by the National Library Service for the Blind and Physically Handicapped, Library of Congress. Seeking ever to increase the number of readers we can serve, while maintaining the high quality of our services, we depend on a team of dedicated volunteers. Volunteers perform a variety of tasks vital to running the program, tasks like (describe appropriately)."

- Why? Include motivational materials, for instance: "With the help of volunteers, your talking-book library for visually and physically handicapped people can reach out to meet the growing demand for service."

Also include in your volunteer message a brief description of the kind of volunteer you need. Inform potential volunteers what opportunities are available in your library and if there are any special skills required. Let potential volunteers know that once they accept the responsibility of volunteering at the library, they will be depended upon by both the staff and the readers in the library.

**Choose Recruitment Activities**

Your recruitment activities should be designed to get your message across to the public. You may choose to spread your message through personal speaking engagements at community gatherings. Or you may wish to distribute literature at public places and to post notices on community bulletin boards. When distributing literature, consider the following locations:

- Local public libraries

- Supermarkets

- Schools

- Local employers
- Government buildings
- Public meeting places

Your recruitment activities should also include the local media such as newspapers and radio and television stations. Many newspapers and local stations set aside space and time for community service messages and will be happy to help you recruit volunteers. Become familiar with the types of coverage available from the media, for instance:

- Newspapers
  - -- press releases: Prepare a press release that incorporates your recruitment message.
  - -- editorials: Submit sample editorials or columns on your need for volunteers.
  - -- calendars: Publicize your presentations and orientation sessions in a local events calendar.
- Radio and Television Stations
  - -- public service announcements: Prepare PSA's on your need for volunteers.
  - -- call-in programs: Discuss your services on call-in programs.
  - -- community response segments: Obtain air time for library staff to describe your program on community response segments.
  - -- news programs: Contact local news programs to announce your need for volunteers or to cover recruitment and orientation events.
  - -- talk show segments: Offer to have a staff member or volunteer appear on local talk shows to publicize the services of your library.
  - -- station breaks: Develop a short form of your recruitment message and submit it for use during station breaks.

**Take Advantage of Recruitment Resources**

NLS has several resources that can assist you. Some ideas can be found in its public relations manual, Reaching People. Advice is also directly available from the Publications and Media Section at NLS.

NLS has also created a volunteer recruitment videotape, "Come On Down to the Library!" Schedule screenings of the videotape at local library functions or other community gatherings.

A general volunteer recruitment brochure, "Volunteer at Your Braille and Talking-Book Library," is available from NLS. You can distribute the brochures at speaking engagements or leave them in public places. The brochure presents basic information about network libraries and answers questions commonly asked by potential volunteers. A reply card on the brochure can be personalized by the library.

Another brochure, "Volunteer Repair Services," is also available from NLS. This brochure was created specifically for recruiting Telephone Pioneers.

## Create Your Own Recruitment Package

An information package tailored to your library's services can be sent to people who express a sincere interest in volunteering. The package should include the following:

- Cover Letter -- Personalize your volunteer information packet with a cover letter describing your library services to visually and physically handicapped readers. It can be a form letter addressed to "Dear Volunteer."

- Facts About Your Program -- This one-page fact sheet should describe your local program and its goals. Include a list of the volunteer opportunities available at your library.

- Application -- The application should be brief and elicit the volunteer's skills. A sample application that you can modify is provided at the end of this chapter.

- Volunteer Service Agreement -- This agreement is to show volunteers that a commitment is required of them by the library. A sample agreement that you can revise to meet your needs is provided at the end of this chapter.

- Miscellaneous -- Include any other materials in your packet that you feel are appropriate: library or volunteer newsletters or news clippings, for example.

## DEALING WITH SUCCESS

Once you start your recruitment activities, you will be receiving written inquiries, telephone calls, and walk-in visits from potential volunteers. Different libraries handle initial inquiries from potential volunteers in different ways. It is important that you prepare for a successful recruitment program by developing an efficient system to handle the responses to your recruitment drive. Make sure the entire library staff knows where to direct volunteer inquiries. You will lose potential volunteers if you appear disorganized.

### Information Packet

The most efficient use of your time is to let your information packet and orientation materials speak for you. Your recruitment information packet is designed to supply the potential volunteer with the basic information they need to make a decision about whether or not to volunteer.

### Reply Cards

If you are using brochures that feature reply cards, you can respond to these expressions of interest at your convenience. The advantage here is that you can plan a quiet hour to contact these potential volunteers. Try to contact these respondents within a week, however, to avoid alienating them.

### Phone Calls and Walk-In Visits

Many libraries try to keep initial contact with potential volunteers brief. Although some libraries can afford the staff time to deal with walk-ins immediately and individually, most need to find a more efficient way to deal with these initial inquiries.

Your time is valuable. Many network librarians feel that it is an inefficient use of their time to drop everything for individual phone calls or walk-in visits, because not everyone who inquires about volunteering will pursue it further. These librarians choose to express their interest in potential volunteers and offer to send information and schedule an interview. Other librarians prefer to take the time to conduct on-the-spot interviews and give prospective volunteers a brief tour. Alternative methods of conducting interviews are discussed in the following chapter.

SAMPLE VOLUNTEER APPLICATION FORM

Mr. Miss
Ms. Mrs. _____
Last Name First Middle

Address: _____
Number, Street, (Apt. No.) City State ZIP

Phone: Home_____ Office_____ Date of Birth_____

Education: Circle last year completed Grade: 5-6-7-8-9-10-11-12 GED

College: 1-2-3-4 Graduate: 1-2-3-4-5 Major _____

Special Training: _____

_____

Skills & Interests: _____

_____

Work Experience: Job Date

_____ _____

_____ _____

_____ _____

Volunteer Experience: _____

Availability for Volunteer Work:

| | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| Morning | | | | | |
| Afternoon | | | | | |
| Evening | | | | | |

In case of emergency, please notify _____
Name

_____ _____
Office # Home #

Volunteer's Signature: _____ Date: _____

SAMPLE VOLUNTEER SERVICE AGREEMENT

This statement constitutes an agreement between (name of library) and the volunteer.

(Name of library) agrees to the following:

- To provide the volunteer with adequate work space and necessary supplies and equipment
- To offer the volunteer an orientation course and on-the-job training, as needed
- To assign a staff supervisor to the volunteer for guidance and consultation
- To evaluate the performance of the volunteer on a regular basis
- To give the volunteer the opportunity to meet with library staff

The volunteer agrees to the following:

- To comply with library rules and policies
- To attend orientation and training sessions for volunteers
- To accept guidance and supervision from the staff supervisor and maintain a smooth working relationship with all employees and volunteers
- To complete assignments to the best of his or her ability
- To notify the staff supervisor of an absence at least 24 hours in advance of scheduled volunteer time
- To notify staff supervisor in writing well in advance of extended absence or resignation

As a volunteer, I agree to work at the network library a minimum of ____ hours per week/month. This agreement terminates (date).

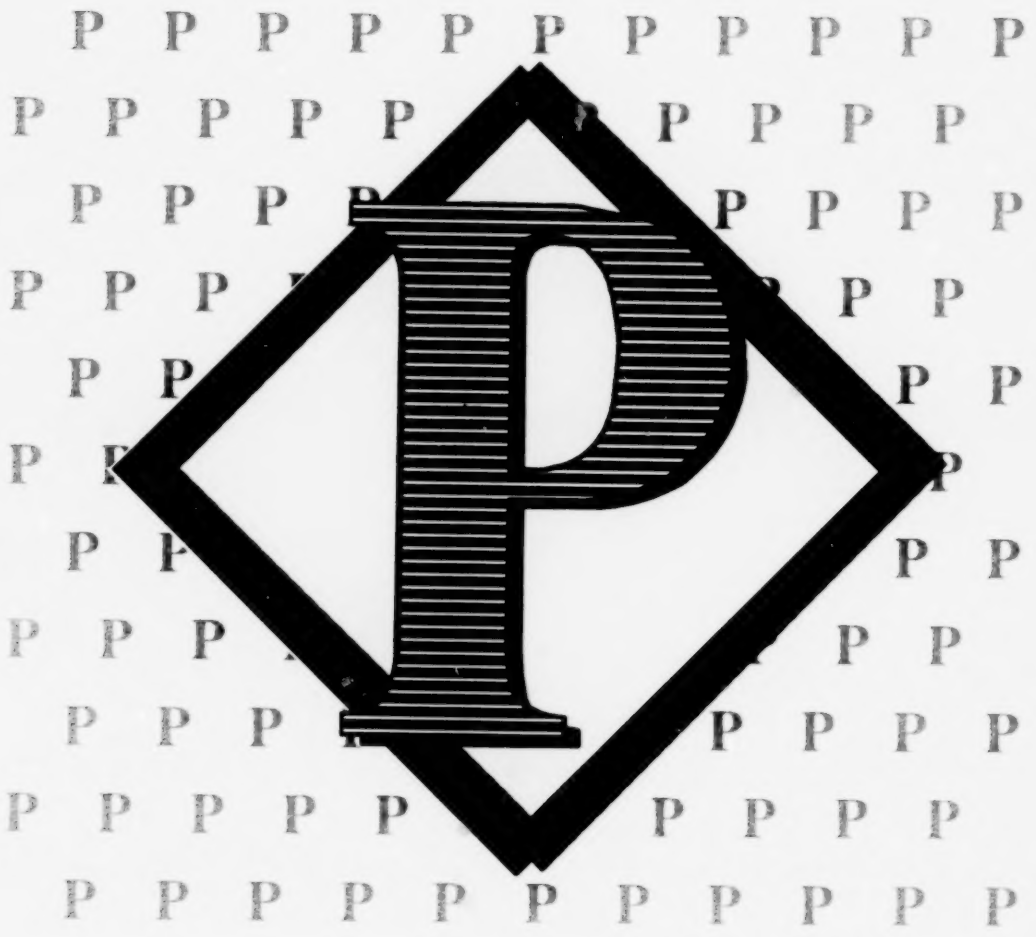
_____ _____

Volunteer (signature) Date

_____ _____

Volunteer Coordinator (signature) Date

# PLACEMENT & ORIENTATION 3





*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

## 3. PLACEMENT AND ORIENTATION

The process of placing and orienting your volunteers serves as an adjustment period for your new volunteers and for yourself. During this time, you become familiar with the new volunteers. At the same time, they can develop a basic understanding of the operations of your library and a sense of belonging to the system. By developing an efficient, organized system for placement and orientation, you give yourself the opportunity to build a strong volunteer program with the best volunteer personnel available.

### INTERVIEWING AND PLACING

How you choose to conduct interviews and place volunteers depends on the size of your program and on the amount of responses you get to your recruitment activities. If you're just starting out, you may choose to conduct interviews and give brief tours to walk-ins. If you have a large program with a thriving recruitment campaign, you may find it more efficient to conduct interviews for all potential volunteers on the same day rather than individually. In either case, conduct interviews promptly so potential volunteers do not lose interest in the program.

#### Conduct Interviews with Recruits

Personal contact with potential volunteers is the easiest way to determine whether they meet your criteria and, if so, where they should be placed. Try to keep each interview as brief and informal as possible. Seek out volunteers' motives for wishing to become involved in your program and any special interests or unique skills they have. Let interviewees talk: ask questions that can't be answered with a simple "yes" or "no," for example, "Will you explain why . . ." or "Can you comment on . . .."

This is also an opportunity to determine which of your recruitment activities is the most effective. Ask interviewees where they heard about your program. Their responses will tell you which method of recruitment has been reaching the most people.

Toward the end of the interview, ask your potential volunteers where they see themselves fitting into your program. Briefly review the various job descriptions and invite them to tell you what they'd like to do. Close the interview by telling potential volunteers when you will be contacting them with your decision. Thank them warmly for their interest.

Take a few minutes at the conclusion of each interview to jot down your impressions. You may find it useful to design a quick checklist of the criteria you are seeking and fill it in after each interviewee leaves. If the individual struck you as being particularly well-suited for one particular job, or revealed special skills that could be useful, make note of these findings.

### Assess the Applicants

Review the volunteer applications and the information you obtained during interviews. Select for assignment only those people who meet the criteria for volunteers in your library. Saying no is difficult, but it is sometimes necessary. Contact the people you don't wish to place and, if possible, refer them to a volunteer program that may be more suitable for them.

### Assign Volunteers to Jobs

Assign applicants to volunteer positions by matching their interests and skills with the library's needs. Try to place them with compatible staff members who are receptive to the program. Make sure you don't overload the staff with help they did not request. The volunteer is in your library to help staff members keep up with the existing workload and to enhance the program by allowing more patrons to be served. Staff members should not have to spend time and effort generating busywork for volunteers.

Remember that volunteers placed in inappropriate positions do not stay. Make sure that tasks are neither too difficult nor too simple. You may be able to rotate a less desirable volunteer job among several volunteers, so that no single person has to do it often.

In addition, try to use those volunteers who reveal special skills creatively. Think about how a person who can speak Spanish, for example, might help revive a long-shelved outreach project rather than being given a clerical task.

## ORIENTATION PLANNING

### Involve Your Staff

Allow your co-workers a chance to participate in the development of your orientation program and materials. They may provide information on areas of library operations you're not familiar with or hadn't considered. Furthermore, you may need staff members who are not often directly involved with the volunteer program to provide extra support during large orientation sessions.

## Define Orientation Goals

Set realistic goals for your orientation program. Consider the following goals as examples:

- I want to hold orientation sessions every _____ to _____ weeks/months.
- I want to hold orientation sessions for _____ new volunteers at a time.
- I want new volunteers to be contributing members of the library volunteer program in no more than _____ weeks after their initial responses.

-or-

- I want _____ volunteers to have attended sessions/received orientation materials in the first year of my volunteer program.

## Plan the Agenda

To save time, take advantage of materials available from NLS and the materials that you've developed. The following is a sample agenda for orientation sessions. You can tailor it to your program.

- Slide-Tape Show -- Begin your orientation session by showing the program "More Than Meets the Eye," a slide-tape show available from NLS. The show is designed to give a general overview of the braille and talking-book program and the readers it serves, and every network library has been provided a copy.
- Library Goals -- Briefly describe the library's commitment to service for visually and physically handicapped persons.
- Tour -- Conduct a brief tour of the library building and describe the activities that occur in each working area.
- Videotape -- Offer to screen the videotape "Come on Down to the Library!" to anyone who did not see it during your recruitment activities. The videotape is available from NLS and every network library has been provided one copy. It shows how volunteers help the talking-book program.
- Discussion of Volunteer Jobs -- Discuss all volunteer opportunities at your library, mentioning first the positions you are most eager to fill.

- Overview of Volunteer Handbook -- Describe in general terms what is covered in your library-produced volunteer handbook. Encourage volunteers to read it thoroughly when they have an opportunity.

- Terms of Service -- Discuss the volunteer service agreement found in the handbook. Stress that the library needs a certain amount of regularly scheduled time from its volunteers. Discuss volunteer rights and responsibilities.

- Questions and Answers -- Allow time for a question and answer period after you've concluded your presentation. You may want current volunteers and/or staff supervisors to remain available for questions after the orientation session is concluded.

**STAFF ORIENTATION**

Before holding your first volunteer orientation, hold a staff meeting to discuss the volunteer program. By now, all of your co-workers should be aware that you are initiating or revising the volunteer program, so use this session to update staff on your progress. Tell them your program is under way and let them know when to expect the first volunteer.

It is important to explain the mechanics of the volunteer program to the staff. Briefly describe the criteria by which volunteers will be placed, trained, supervised, and evaluated. Let them know that you are open to relocating a volunteer should staff considerations make it necessary. Emphasize that volunteers are being brought into your library to help serve patrons, not to replace staff.

Encourage positive attitudes toward your program by stressing the beneficial results you anticipate. Discuss ways the library will be enhancing services and meeting a growing demand. Specify the programs your library can initiate or expand with the use of volunteers. For example, if you're starting a senior outreach program, describe it as an improvement in service.

Let staff know that you will continually seek their opinions about the way the volunteer program is working. Assure them that you are open to both positive and negative comments, and that suggestions for improvement and ideas for solving problems or expanding services will be valuable.

If you have chosen particular staff members to help you run the first volunteer orientation, meet with them separately. Discuss the agenda, roles of each participant, and logistics. If prepared, staff can often field questions informally, after the session breaks up.

## VOLUNTEER ORIENTATION

Depending on the number of new volunteers you have, you can conduct orientation sessions for all new volunteers or just for those volunteers placed in a particular job position. For example, you can hold separate orientation sessions for all new narrators or for all new volunteers performing clerical tasks.

### Schedule Orientations Regularly

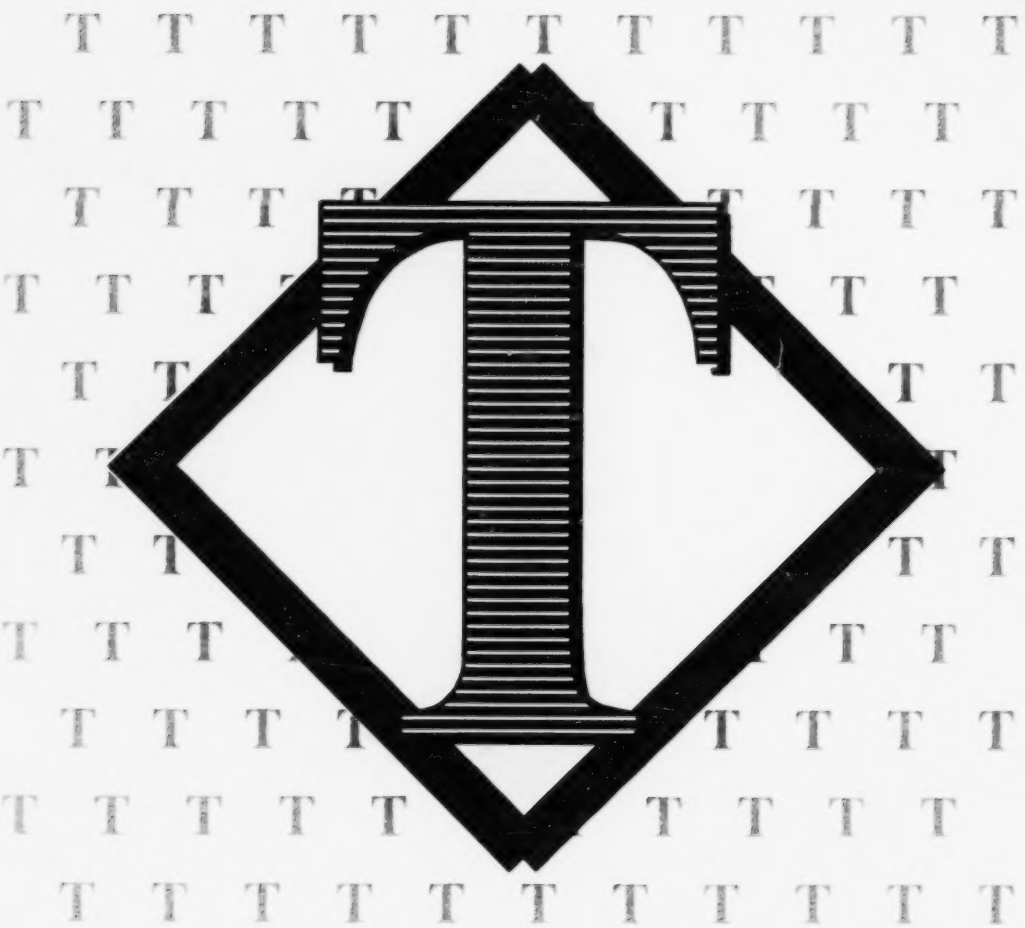
The length, formality, and frequency of your volunteer orientation sessions will also vary according to the number of people attending. No matter how often you schedule your sessions, hold them at regular intervals and offer both day and evening sessions.

### Create a Good Atmosphere

The size of your orientation session will depend on the scope of your program and its recruitment activities. The audience should range from three to a maximum of twenty potential volunteers. Try to keep the group at a size where everyone can participate. Arrange chairs in a setting that will encourage friendly communication. Express your appreciation for the interest that brought your listeners together. Warm up the audience--orientation is your first opportunity to kindle team spirit.

Have some experienced people on hand, too. If you already have volunteers, ask the most personable and knowledgeable to help out. Encourage all staff members who work closely with volunteers to attend orientation also, especially those who have the most positive attitudes.

# TRAINING 4



*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

## 4. TRAINING

Organized training is essential for even the simplest volunteer tasks. Complex or technical volunteer jobs will require more formal training and instructional materials. Your unique situation will dictate the depth and breadth of your training program. When developing it, remember that a well-structured training program underscores the importance of volunteer services. Written materials, although they need not be elaborate, help many people learn and can serve as resources to help guide the volunteer.

### THE TRAINING PLAN

#### Involve Staff and Volunteers

How you plan for training depends on whether you are expanding your volunteer program or are starting from scratch. In the former case, ask staff and volunteers to tell you what worked for them and what didn't. This information can be used to sharpen existing training techniques or to plan new ones in other areas. If you are just starting up a volunteer program, ask staff and administrators to join you in an idea session. Try to assume the point of view of a newcomer to the library. What would you need to know? What techniques would be likely to help volunteers learn tasks quickly and expertly?

#### Develop a Training Schedule

Coordinate your training and orientation schedules. Training should immediately follow orientation. Develop a separate training schedule for each volunteer job position. For example, clerical training may take only one or two volunteer shifts to complete, while narrator training may take several more. Make sure to integrate the schedules of essential instructors (staff or volunteer) with the training schedule.

#### Use Community Resources

Call upon community resources to help you with your training programs. Local industry and service organizations may be able to lend valuable expertise to your program. If you are teaching narrators, see if you can enlist the aid of professional narrators or speech teachers in your community to help with auditions and instruction.

### Develop a Curriculum and Training Materials

The development of a standard training curriculum and educational materials lends consistency to your training program. This "curriculum" need only be a detailed outline, nothing elaborate. The point is to make sure training sessions are complete and consistent--that volunteers performing similar tasks have similar training.

### Incorporate NLS Materials

Take advantage of the training materials and services provided by NLS to network libraries. A bibliography of these resources can be found at the end of this chapter.

### Fine-Tune after Evaluation

Evaluate training sessions and incorporate changes into your training plan. Evaluation questionnaires can be filled out by volunteers at the end of each learning session. Another evaluation after a month or so will reveal the real-world effectiveness of the training. Did the instruction volunteers received really prepare them for the work, or did they actually learn more on the job? Discuss findings with your trainers and revise strategies accordingly.

## STRUCTURING THE TRAINING SESSIONS

Experiment with training techniques, building upon those that work best and discarding elements that seem less effective. Approaches should be matched to the type of work being taught. Clerical skills, for example, are probably most easily developed by observation, with accompanying explanations of technique and rationale for the procedure. (Most people want to understand the goals their tasks are meeting, and are happier if they know the "why's" behind their activities.) On the other hand, a monitor should learn on the equipment itself, as well as receive lectures and demonstrations.

The following approaches have proven effective at facilitating the learning process:

- Interactive Learning -- Encourage exercises like question and answer exchanges between lecturer and audience, volunteers monitoring one another's practice attempts, and small-group exercises where the expert demonstrates while the trainees ask questions.

- Hands-On Practice -- Under proper supervision, volunteers should be encouraged to try the actual tasks they will be performing. This makes the work more concrete for them, and alleviates any anxiety they may have about operating the equipment.

- Training Materials -- Ensure quality control in your training by developing some simple, written guidelines for instructors. You will soon distill from your experience a list of "do's and don'ts" that facilitate or undermine the learning experience.

- Trainee Materials -- Develop handouts and training materials for new volunteers. Written materials do not have to be elaborate but they do facilitate volunteer learning. Brief procedures checklists for each volunteer position can serve as learning tools and as valuable operating guidelines once the volunteer is on the job. In addition, have demonstration materials--tapes, packages, storage shelves, brailling machines--on hand for the instructors to use.

**TRAINING STAFF SUPERVISORS**

It is particularly important to train staff in libraries where volunteers will learn and work under leaders with little supervisory experience. Many professionals who are training staff for the first time--especially if they are very busy themselves--grow impatient with the time it takes to "break in" the new people. Staff must be repeatedly encouraged to think about the long-term benefits of having volunteer help; that a small investment of time and energy will have a great payoff. Your staff training should emphasize the efficiency of your volunteer training--that together you will teach a group quickly to become effective helpers.

Stress the following principles of supervision. The supervisor:

- Confirms that the volunteer jobs are being accomplished.
- Helps volunteers perform their work.
- Understands that supervision is a matter of giving volunteers guidance rather than checking up on them.
- Encourages pleasant working relationships among volunteers and business-like relationships between staff members and volunteers.
- Demonstrates respect for volunteers and shows appreciation for the work they do.
- Deals with volunteers in an objective and honest manner.

- Is able to identify and resolve personnel conflicts.

- May find it necessary to reprimand volunteers. Should this situation arise, the supervisor should approach the volunteer privately and in a diplomatic manner.

Choose your trainers from staff most enthusiastic about the volunteer program. Resistant staff members may alienate volunteers and may view training duties as a burden.

## TRAINING VOLUNTEERS

### Organize Sessions Appropriately

To open your volunteer training session, briefly review practical information about library terms and procedures as it applies to all your volunteers. By this time, everyone who attended the orientation session should have thoroughly read your volunteer handbook. Encourage new volunteers to ask questions that may have come up between orientation and their first day of training.

Once new volunteers are familiar with the program and the library, they should be taught the specific tasks involved in the jobs they will perform. Depending on your training needs and the size of your classes, you may take various approaches. You may split a "mixed" group of volunteers--a group of volunteers being taught to perform more than one task--into separate workshops, where they will learn their different skills. Or, your training session may be designed to include only volunteers involved with a specific task, such as tape and disc inspection.

When instructing groups of volunteers, you may find it useful to categorize training modules in the following way:

- Book circulation and maintenance

- Book production

- Repair work

- Reader services

- Outreach and administration.

### Train Volunteers to Teach and Supervise

When your program is under way, teach current volunteers to supervise and train new ones. This is one of the best ways to expand your volunteer program, but you must still keep quality control checks on the work of the second and third "generation" of volunteers.

The principles of teaching staff to become trainers also apply to volunteer trainers. These individuals are a valuable resource, as they understand first-hand what it was like to learn library procedures "from scratch."

**Meet the Needs for Educational Growth**

Look upon volunteer training and education as a continuing process. Allow experienced volunteers to grow in knowledge, skills, and ability. Encourage volunteers to keep abreast of library activities and inform them of any changes in library policies and procedures.

## BIBLIOGRAPHY OF TRAINING MATERIALS AVAILABLE FROM NLS

The following materials are available from the National Library Service, Library of Congress, Washington, DC, 20542:

**Machine Repair**

- Composite NLS equipment maintenance and repair -- Video cassette explaining amplifier board repair, nickel-cadmium batteries, playback equipment repair, and troubleshooting each of the types of machines. (Every network library has been provided with a copy of this tape.)

**Recording**

- INTRODUCTION TO BOOK MASTERING -- Video cassette introducing the complexities involved in producing books and magazines that meet NLS technical standards. (Available from the NLS equipment and materials maintenance coordinator.)

- OPERATION AND BASIC MAINTENANCE OF TAPE DUPLICATOR -- Video cassette and technical maintenance guide providing general information on the operation and components of the Telex tape duplicator. (Available from the NLS equipment and materials maintenance coordinator.)

- SPECIFICATION #702; TAPE SPECIFICATION -- Gives requirements for open-reel, premeasured mastering tape. (Available from the NLS Materials Development Division.)

- TAPE RECORDING LESSONS, 2d ed. National Braille Association -- Provides practice in the formats and usages recommended in the NBA TAPE RECORDING MANUAL, 3d ed., and is to be used in conjunction with it. (Available from the NLS Network Services Section.)

- TAPE RECORDING MANUAL, 3d ed. National Braille Association -- Provides instruction to the novice tape-recording volunteer and serves as a reference manual during recording sessions. (Available from the NLS Network Services Section.)

- TECHNICAL STANDARDS (Available from the NLS Network Services Section.)
  - #1 - Tape Mastering; Open-Reel Tape Specifications
  - #2 - Tape Mastering; Review Monitors, Monitors, Studio Narrators, and Home Narrators
  - #3 - Recording of Books and Magazines for Tape Mastering
  - #4 - Tape Mastering; Recording Equipment
  - #5 - Tape Duplication; Open-Reel Intermasters
  - #6 - Tape Duplication; Cassettes
  - #7 - Disc and Cassette Books; Labeling, Packaging, and Handling
  - #8 - Open-Reel and Cassette Tape Duplication Equipment
  - #9 - Tape Duplication Technicians and Aides

**Braille Transcription**

Note: To provide guidance to volunteer braillists and proofreaders, the Braille Development Section prepares and distributes guides and teaching manuals on several braille codes and holds various workshops. The section also offers correspondence courses in music and mathematics braille transcription and braille proofreading; students of literary braille are accepted for correspondence courses if local instruction cannot be arranged. Certificates of proficiency are awarded for satisfactory completion of each of the courses.

- TECHNICAL STANDARDS (Available from the NLS Materials Development Division.)
  - #10 - Hand-copied Braille Masters
  - #11 - Braille Copies

**Literary**

- THE CHALLENGE OF BRAILLE TRANSCRIBING -- Video cassette providing potential volunteer braille transcribers with a brief history and introduction to braille and describing the NLS braille transcription course. (Available from the NLS equipment and materials maintenance coordinator.)

- ENGLISH BRAILLE, AMERICAN EDITION, 1959. Rev. ed., 1972 -- The official rule book for the literary braille code used in the United States. Free to students and certified transcribers and proofreaders. (Available from the NLS Braille Development Section.)

- INSTRUCTION MANUAL FOR BRAILLE TRANSCRIBING, 3d ed., 1984. Maxine Dorf and Barbara Tate -- Teaches the braille system and official rules for braille transcription. Free to U.S. residents studying toward certification in braille transcribing. (Available from the NLS Braille Development Section.)

**Mathematics**

- AN INTRODUCTION TO BRAILLE MATHEMATICS. Helen Roberts, Bernard M. Krebs, and Barbara Taffet -- Teaches sighted persons the symbols and rules of the official mathematics braille code. Free to braille mathematics transcribing students working towards certification. (Available from the NLS Braille Development Section.)

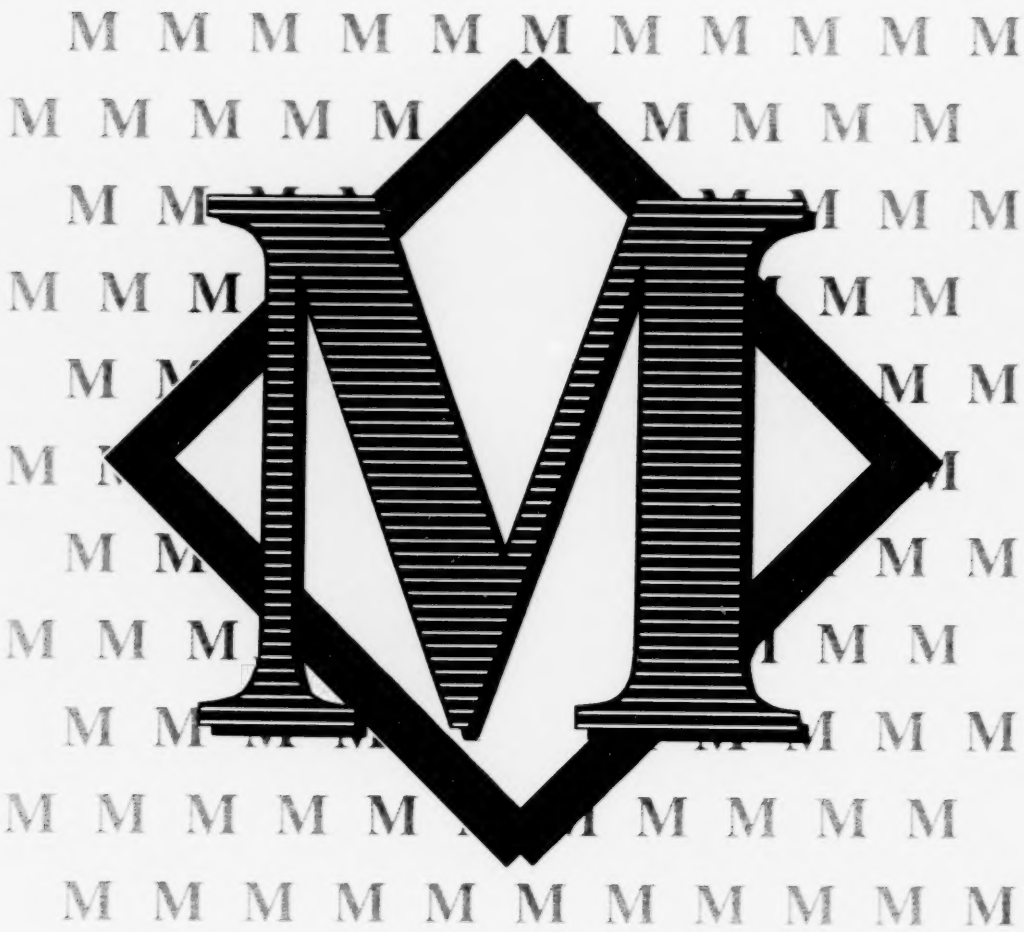
- NEMETH BRAILLE CODE FOR MATHEMATICS AND SCIENCE NOTATION, Rev. ed., 1972 -- Official rule book for the mathematics braille code used in the United States. Free to braille mathematics students and certified transcribers. (Available from the NLS Braille Development Section.)

**Music**

- INTRODUCTION TO BRAILLE MUSIC TRANSCRIPTION. Mary Turner De Garmo -- Teaches sighted persons the symbols and rules of the official music braille code. Includes addenda. Free to braille music transcribing students working toward certification. (Available from the NLS Braille Development Section.)

- REVISED INTERNATIONAL MANUAL OF BRAILLE MUSIC NOTATION, 1956; part I - WESTERN MUSIC. H. V. Spanner -- With two American addenda (1975 and 1981), is the official music braille code in the United States. Free to braille music transcribing students and certified transcribers. (Available from the NLS Braille Development Section.)

# MANAGEMENT 5



## 5. MANAGEMENT

It is a challenging task to manage volunteers effectively. Your approach for managing library staff can serve as a model for volunteer management, but volunteers differ from employees in several ways. First, some may have little formal employment experience. Second, volunteers usually work very short hours, and the challenge is to maximize their productive time. Third, group work is often a feature of volunteer activities, and a balance must be found between achievement and enjoyment. Fourth, and most importantly, volunteers are not paid. This chapter will explore the management of volunteer workers from three aspects: The Management Plan, Steps for Successful Management, and Management Guidelines.

### THE MANAGEMENT PLAN

#### Use Internal Resources

As with previous kinds of planning, be sure to involve administrators, paid staff, and current volunteers in developing management strategies. Their inclusion in management planning helps to create and sustain a positive climate for volunteers and assure that the program stays focused on library goals. The support and participation of senior-level administrators is especially important, because other paid staff tend to follow their examples. In addition, experienced managers are likely to have useful suggestions and advice in the areas of supervision and staff development that can be applied to volunteers.

Base your volunteer management plan on the long-term and day-to-day management strategies currently used among the library's paid staff. Because motivation and incentive are different for volunteers than for staff members (see Chapter 6), management strategies related to or based upon them will probably have to be revised for unpaid workers.

#### Use NLS Resources

A list of materials available from NLS can be found at the end of this chapter. Also, as part of the support given to network libraries, NLS has designated staff to assist in the management and coordination of various aspects of volunteer programs. Consultant assistance available from the NLS staff includes:

- The volunteer/consumer specialist assists libraries in establishing, developing, or expanding volunteer programs and answers questions relating to the administration and utilization of volunteers.

- The audio book production specialist assists the network in developing, upgrading, and expanding recording programs and facilities.

- The equipment and materials maintenance coordinator coordinates the nationwide repair of TBMs and CBMs.

- Full-time network consultants visit all regional libraries on a regular, biennial basis, and review and make recommendations on volunteer programs as part of their overall evaluation of library service.

- Staff members at the Quality Assurance Program at the Multistate Center for the Midlands/South evaluate, duplicate, and distribute volunteer-produced books and magazines.

## Tap Community Resources

If you are having trouble adapting current management strategies to the volunteer situation, seek aid from community resources to develop an appropriate volunteer management plan. Representatives from SCORE and RSVP can provide particularly good advice. They are not only seasoned veterans of the business world, but volunteers who can offer consultation services to managers. This dual perspective may provide the perfect solution to unusual problems you may face. Local business colleges may also be tapped for their management expertise. A workshop for staff managers is an ideal way to help the library formulate a good management plan.

To maximize the helpfulness of these consultants from the community, you should be prepared for them. They will have to make a quick assessment of your situation before they can prescribe an approach. So before contacting them, outline your current management ideas. Prepared with this information, you can readily discuss various approaches with volunteer management consultants, because you will have already considered what is likely to work or not work, and why.

## Keep Your Plan Flexible

Remember that your management plan should include provisions for evaluating volunteer management (see Chapter 8). Revise your management plan and strategies as results come in from the periodic evaluations you've scheduled. Circumstances change as a volunteer program matures, and management strategies should be modified to reflect those changes.

## STEPS FOR SUCCESSFUL MANAGEMENT

### Develop Avenues for Communication

Communication between staff and volunteers is the area where many library programs need work. It is essential that volunteers feel they are a part of the library organization. Devise methods of formal and informal communication that will promote solidarity among your volunteers and the staff working with them.

Many libraries send memos and mailgrams to volunteers or create volunteer newsletters and bulletin boards. In designing such tools, incorporate a friendly tone and make a conscientious effort to include information that will pique the volunteer's interest. Highlight frequently asked questions or areas of confusion for volunteers; report on the newest events of concern to the library, for example, new construction, budget meetings, or legislation that affects the library; and showcase staff profiles, volunteer achievements, or stories about patrons. Such information will help volunteers feel like part of an important team. Newsletters, memos, and bulletin boards also provide recognition to volunteers who have done an exceptionally good job. (See Chapter 7 on recognition.)

Emphasize to library staff that their management duties are twofold: they must be active and receptive. While they should direct and instruct volunteers, they must also respond thoughtfully to questions and concerns volunteers may have. This exchange of information is essential to good management. Encourage both staff and volunteers to share their thoughts about the program and their attitudes toward their working relationships by developing mechanisms for them to do so. For example, you might:

- Hold formal staff meetings regularly, so that staff members involved in the program can share information.
- Informally inquire whether staff members are comfortable with the work required of them and the volunteers assigned to them.
- Set up a suggestion box through which both volunteers and staff can anonymously state their views.
- Make yourself available to volunteers who wish to discuss their views or suggestions with you. (You may want to establish "volunteer office hours," a regularly scheduled time when you are at your desk and available to meet with and receive calls from volunteers.)
- Encourage both staff and volunteers to make suggestions during their regular evaluations (see Chapter 8).

## Maintain Records

Record keeping is a valuable management tool. Although many people are intimidated or dismayed by the thought of paperwork, the most time-consuming part of record keeping is developing the system. (It is also the most challenging and interesting part.) Once an organized, efficient record-keeping system is created, the tasks of updating and monitoring volunteer records should be turned over to volunteers.

The different kinds of records you keep on the volunteer program can benefit the library, the staff, and the volunteers themselves. Records can reveal how the library is realizing its return on investment for the program as a whole; they can help the staff supervise and evaluate volunteers; and they can aid volunteers in gaining recognition and documenting experience. With more and more young people and students volunteering and using volunteer experience as a reference for paid employment or admission to college, it is important to be able to provide them with accurate credentials.

When developing a record-keeping system, keep in mind how you want the records to work for you. What types of information do you need? What kind of analysis do you want records to reveal? What is the best way to log and organize data the first time it is entered so that information can be obtained and manipulated easily?

Put a sensible, curious volunteer in charge of record keeping. Such an individual will monitor the record keeping with a critical eye, noting areas for improvement, information trends, and omissions. Keep receptive to suggestions from capable record-keeping volunteers. Their ideas could pay off handsomely when the time comes to revise your system or request extra funding for the program. Find out whether any of your volunteers are involved in the expanding discipline of data analysis. This expertise will improve the effectiveness of your record-keeping system.

There are a few basic kinds of records that are critical to the support of your volunteer program. These are described in the sections that follow. There is no "right" or "wrong" way to maintain records for your volunteer program. Results are what count. Experiment with the suggestions given below to determine what works best in your situation.

### Volunteer Personnel Files

You should have an active personnel file for each of your volunteers. This file should include:

- The volunteer's original application.
- All job positions held by the volunteer during the term of service.

- A summary sheet of hours logged by the individual volunteer (updated monthly or annually, depending on your system).

- All evaluations of the volunteer, including notations of outstanding achievements and awards, as well as notes to the file on performance and behavior.

- Service agreements, insurance forms, or any other forms or agreements signed by the volunteer.

- Any other personal records required or suggested by legal counsel and insurance advisors (for example, emergency information).

**Daily Sign-in/Sign-out Logs**

Maintain a log for volunteers to sign in and out. The log can be a simple form on ruled paper, but should be bound into a book. Create columns for the volunteer's name, the date, time in, and time out. Leave a blank column on the far right for the bookkeeper or other responsible person to tally the hours. (See Figure 5.1.) Keep the log in a place convenient for volunteers, where they are sure to see it as they come and go, and make sign-in responsibilities an important feature of orientation, training, and on-the-job habits.

**Tally Sheets**

Keep track of the total number of hours worked by volunteers for recognition activities and return-on-investment statistics. You may want to develop a form for this purpose, but suitable ledger paper is available at any office supply store. Either way, keep in mind the types of information you want the sheets to give you.

Most libraries use one adaptation of the two sample tally sheets described below. The one you choose will depend on the number of volunteers in your program and the frequency with which they volunteer.

Sample Daily Tally Sheet

If you have a large volunteer program with many volunteers working on a weekly basis, you will probably find this sample tally sheet most helpful. Each page represents one month, and records should be updated weekly. (See Figure 5.2.)

FIGURE 5.1: SAMPLE SIGN-IN/SIGN-OUT LOG

| VOLUNTEER NAME | DATE | TIME IN | TIME OUT | TOTAL HOURS |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

FIGURE 5.2: SAMPLE DAILY TALLY SHEET

MONTH: _____ 19__

| VOLUNTEER NAME | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | TOTAL HOURS (by vol.) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOTAL HOURS (by day) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | (GRAND TOTAL) |

The name of each volunteer should be entered down the left side of the page. Across the top of the page are the dates of each day of the month, one to thirty-one. Enter the figures for hours worked from the sign-in/sign-out logs. Adding across, you get a figure for the total number of hours a volunteer has worked each month. This figure should be added to the volunteer's personnel file and can be used for volunteer recognition. Adding down, you have a figure for total volunteer hours worked by all volunteers on a daily basis.

The grand total for the month is figured by adding the totals by volunteer or the totals by day. (They should match.) The grand total is an essential piece of information for determining your return on investment.

Sample Monthly Tally Sheet

This form should be used if most of your volunteers work on a monthly basis rather than weekly. It is used much the same as the Daily Tally Sheet except that the vertical columns represent the entire month rather than one day. (See Figure 5.3.)

Once again, total hours per volunteer are figured by adding across the page. The total number of hours worked by all the volunteers in one month can be figured by adding down each column. The grand total of this form gives you a figure for the total number of hours worked by all your volunteers for the entire year.

Other Tally Sheets

If you have a large program in which many volunteers are doing a multitude of tasks, you may want to divide tally sheets up by department or task (for example, have separate tallies for book production and book inspection). Then summarize the figures from these two sheets on one tally similar to the monthly sheet. Another way to divide the tally sheets is by supervisor, logging all the volunteers that work under a given supervisor on one sheet.

You may also wish to keep tallies of the number of shifts worked by each volunteer. This total annual figure is very helpful to volunteers who want to keep mileage records for tax purposes.

FIGURE 5.3: SAMPLE MONTHLY TALLY SHEET

YEAR: 19__

| VOLUNTEER NAME | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | TOTAL HOURS (by volunteer) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| TOTAL HOURS (by month) | | | | | | | | | | | | | (GRAND TOTAL) |

## Roster of Completed Projects

Keep a list of projects completed by volunteers. Your statistics for library circulation should help you estimate the following:

- ____ thousand discs inspected and cleaned
- ____ thousand cassettes inspected and rewound
- ____ thousand talking-book machines repaired by Telephone Pioneers
- ____ monthly newsletters mailed
- ____ titles produced locally

Also include any special projects such as reorganizing the bookkeeping system or cleaning out the back room. These figures will help you determine your return on investment. (See Chapter 8 on evaluation.)

## MANAGEMENT GUIDELINES

Establish management guidelines that apply to the special circumstances found in a volunteer program. Many libraries have found the following tips helpful.

### Get New Volunteers Off to a Good Start

The first day on the job is important to everyone. Try to make your volunteers' initial work experiences positive by teaming them with your most enthusiastic staff and current volunteers. Realize that a new volunteer requires extra time and supervision at the beginning and make a special effort to provide this guidance.

### Conduct Follow-up Interviews

After volunteers have been on the job for several work shifts, conduct follow-up interviews. Ask them if the program has met their expectations and try to determine their level of job satisfaction. If they are not satisfied, discuss whether a different type of job is the solution.

These follow-up interviews also provide an excellent opportunity to determine the effectiveness of your training program. Did volunteers learn more on the job than during training? If initial disorientation was a cause of job dissatisfaction, you must establish whether this is an isolated experience or the result of ineffective training techniques. Follow-up interviews may also help you discover whether your new volunteers are ready for advancement.

## Release Unsatisfactory Volunteers

Prepare yourself for the possibility of having to release volunteers from their agreements. Firing volunteers should be a last resort, but if alternatives such as reassignment do not work, you may find it necessary. Act promptly when you realize the situation is not improving. Unsatisfied or unsatisfactory workers will be a drain on the program's resources and are bad for the morale of other volunteers. The negative attitudes of current volunteers can be especially detrimental to new volunteers.

Be as diplomatic as possible should you find it necessary to release volunteers. They may become defensive or angry, so concentrate on their good qualities in the exit interview, and offer to refer them to a more appropriate volunteer program.

## Follow Up with Volunteers Who Quit

There are many reasons why volunteers quit. The most common reason is that something in their life has changed--they've switched jobs, moved, gone back to school, started a family--and they no longer have the time to volunteer. However, some volunteers quit because of problems with the program they did not feel they could discuss with anyone. By following up with these volunteers, you may be able to spot and correct problems with training, supervision, management, or recognition that you hadn't noticed. Indeed, encourage the people you speak with to be frank by confiding your concern that they may have quit because of a problem you are anxious to rectify.

## BIBLIOGRAPHY OF MANAGEMENT MATERIALS AVAILABLE FROM NLS

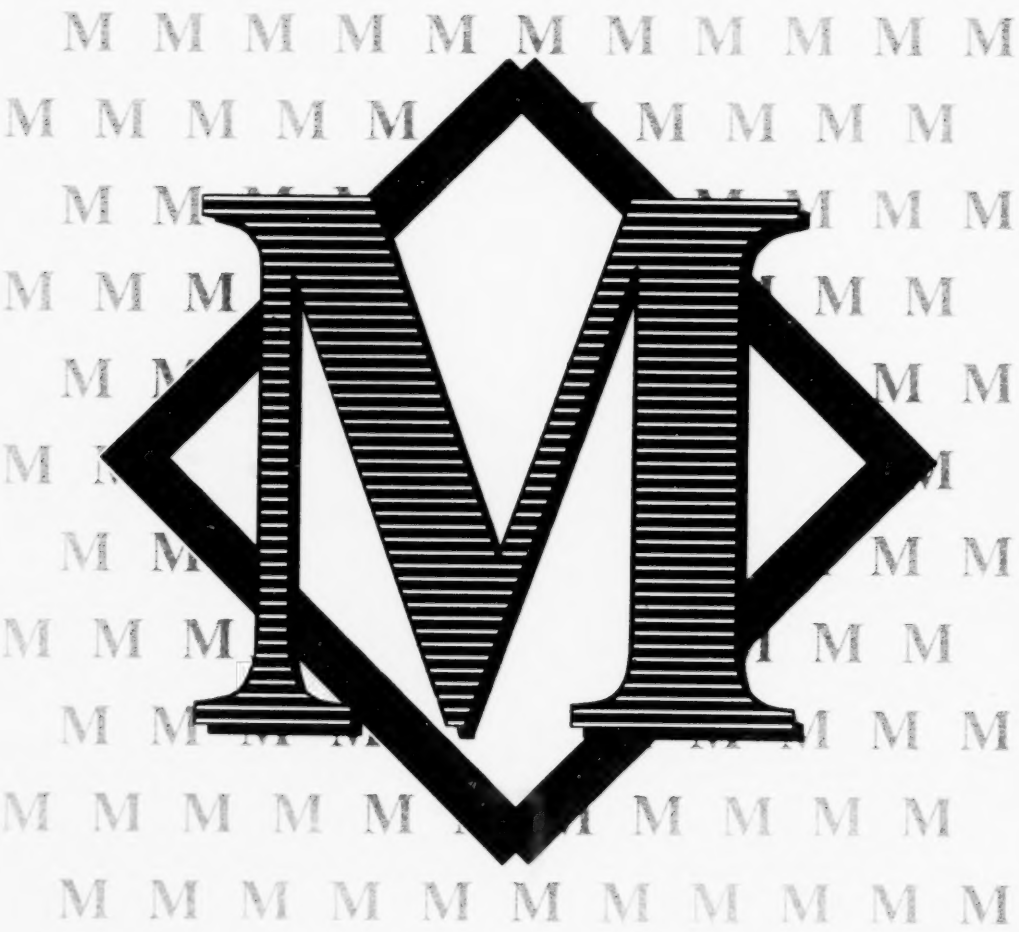
The following publications are available from the National Library Service, Library of Congress, Washington, DC, 20542:

- VOLUNTEERS WHO PRODUCE BOOKS -- This publication is a directory of volunteer groups who produce books in braille, large print, or recorded formats. Groups are listed by geographical location and cross-indexed by the type of material produced.

- UPDATE -- This quarterly, national newsletter provides information on volunteer concerns and activities at NLS, network libraries, and elsewhere. It includes regular columns on volunteer management and various aspects of recording and braille transcription.

- ESTABLISHING AND OPERATING AN NLS BOOK INSPECTION PROGRAM -- This video cassette comes complete with printed guide and includes information on inspecting recorded books for damage.

# MOTIVATION 6



*National Library Service for the Blind and Physically Handicapped*

*The Library of Congress*

## 6. MOTIVATION

Your efforts to keep volunteers motivated will pay off in many ways. A motivated volunteer will stay with the library, keeping your volunteer turnover rate low. Motivated volunteers work hard. They communicate a sense of purpose to one another and to new recruits. They think of ways to improve library service, and many are talented enough to take on the implementation of such improvements with staff supervision. Furthermore, your most valuable recruiters are motivated volunteers who are happy in their positions.

Volunteers are unique people to manage because money is not part of the equation. These workers aren't motivated to perform because they need a paycheck. The drives behind their efforts are more complex than that. The management and motivational challenges are to provide rewards for volunteering that meet the subtle, often unspoken, needs of volunteers: rewards like work that can be enjoyed and performed for its own sake, personal respect and acknowledgement, a sense of meeting community needs, a feeling of creativity and challenge, participation in a gratifying team effort, and the possibility of learning something new.

Providing such an atmosphere can be a decided challenge for you and other library staff. Of course, good management strategies implemented daily are an important way of keeping volunteers satisfied and loyal to the library. (The motivational aspects of management are treated in Chapter 5.) But motivation per se requires some additional elements, some empathy, and some sensitivity. Some of these are described in the sections that follow.

### TIPS FOR MOTIVATING AND KEEPING VOLUNTEERS

#### Make Volunteers Responsible and Accountable

Respect for the work should be made manifest from the first day. Volunteers should feel that they are performing an important and necessary job. Make sure your job descriptions reflect a sense of responsibility, and then hold volunteers accountable to the team for effective performance. The feeling of personal respect and teamwork that this attitude engenders is great motivation.

## Create New Jobs

Don't waste the talents of volunteers who have unique skills. Naturally, you can't reorganize your program for every special volunteer that comes along, but try to be flexible. If you have volunteers that have been with you long enough to have demonstrated a serious commitment to the program, see if they're interested in starting special projects that better employ their abilities.

## Provide Volunteers Room for Advancement

Volunteers should have the opportunity for job advancement. Allow volunteers who show an interest to progress to more responsible jobs. Before promoting volunteers, however, make sure they want the added responsibility. Some people consider volunteering a change of pace from their regular employment and may not appreciate an advancement or more responsibility.

## Keep Volunteer Jobs Interesting

Try to keep volunteer jobs as interesting as possible. This aspect should be taken into account when devising job descriptions. If one or two job descriptions seem especially glamorous, volunteers may become dissatisfied if not given a chance to perform them. Each job should have some feature that is interesting, essential, or fun. Rotate the less desirable jobs among several volunteers. Allow volunteers doing simple, repetitive tasks to work in groups. By socializing while they work, volunteers can be happy and motivated even doing routine tasks.

## Treat Volunteers With Respect

Treat volunteers with the same respect shown patrons and paid staff members. Let them know that you care what they think and want to know how they are doing. As much as possible, give personal attention to volunteers. Learn names, listen to job-related issues and ideas, smile, and be liberal with your praise. Small courtesies go a long way toward motivating volunteers.

Make sure to include volunteers or their representatives in any meetings where decisions affecting them are being made. Set up a system for dealing with volunteer grievances and encourage suggestions from volunteers.

When you do use suggestions from volunteers to adjust the program's operations, give the volunteers due credit. This will boost the self-esteem of the individual involved and communicate to all volunteers that their input is valued.

## Discuss Patron Services

Keep volunteers continually aware of the reason you are all on the job. This focus should be constant, subtle, and never preachy. Communicate to volunteers the interesting and non-confidential information you receive on how patrons are using your services and how they are benefiting from and enjoying it. Discuss what you all observe about the most popular books, circulation trends, the latest specialized book being recorded, and the most often-used medium. Such conversations remind volunteers of overall goals and missions.

## Emphasize a Team Approach

Volunteers are often interested in what others are doing. If your program has several discrete aspects, publicize the current activities or recent accomplishments of each project at meetings, on bulletin boards, or in newsletters. Foster a team spirit: the knowledge that one's teammates need and depend upon each contribution is a powerful motivating force. Devise ways to communicate how each function builds the power of the team. The success of the program depends on even the smallest of volunteer contributions.

## Create a Positive Atmosphere

By creating a positive atmosphere for volunteers, you communicate implicitly that you care about them and their contribution. The volunteer area should be a clean, comfortable, and cheerful workspace, furnished with appropriate and adequate materials, as well as secure areas for personal items and a place to take refreshments.

You can further enhance the atmosphere set by the library's physical environment by using positive management practices. Praise and recognize good performance, while keeping criticism constructive and--whenever possible--private. When mistakes are made that result in poor service, present the need for their correction as a challenge the team must meet.

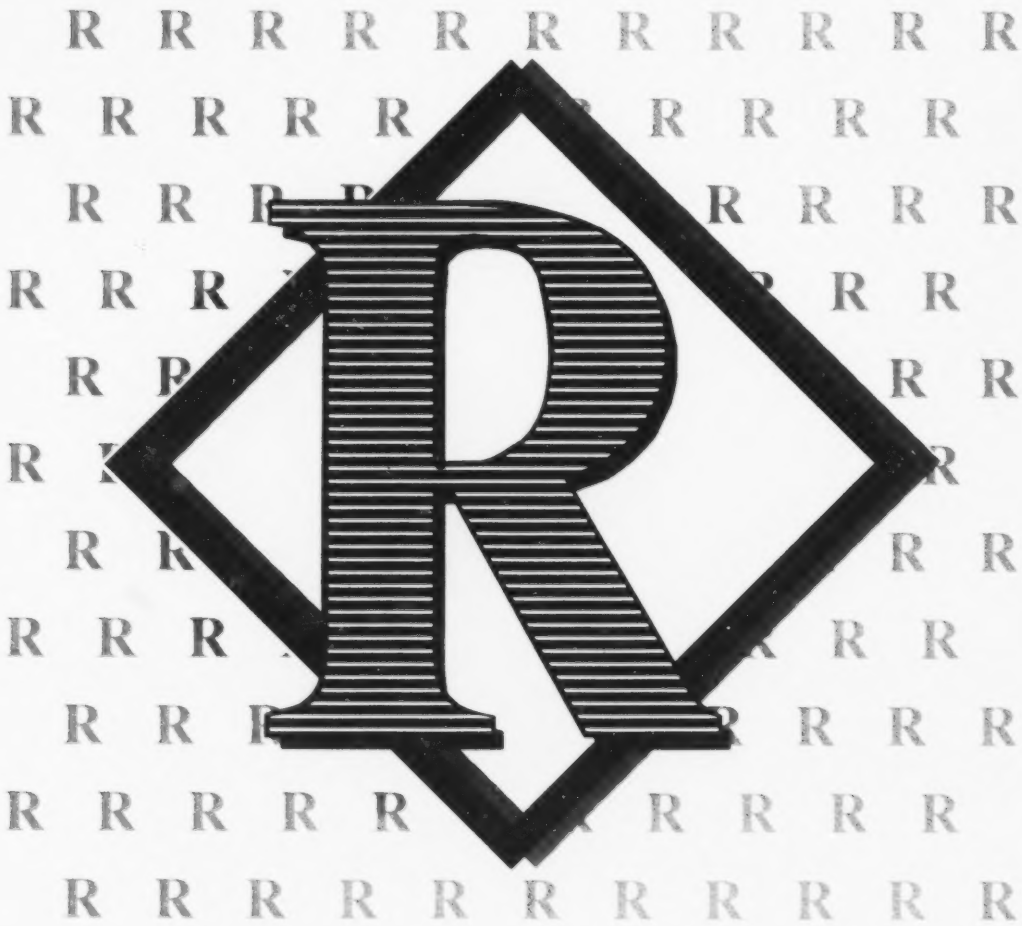
## Restrain "Eager Beavers"

It is possible to have volunteers that are too motivated. "Eager beavers" that want to work on all volunteer projects at once or reorganize your program on their first day need to be restrained. Otherwise they are sure to run into problems. Explain to these over-enthusiastic volunteers that they must work within your guidelines and at the library's pace. Emphasize that they are not taking on a full-time job, and that their goals may be unrealistic given the hours they have to commit. First-time volunteers in particular may tend to believe that they can work wonders in two-hour shifts. By gradually giving these eager volunteers more responsibility, you may save a valuable volunteer from taking on too much too soon.

## Develop Methods for Recognizing Contributions

The next chapter treats volunteer recognition in depth. Both formal and informal methods exist, and both are powerful tools for motivating volunteers.

# RECOGNITION 7





*National Library Service*
*for the Blind and*
*Physically Handicapped*

*The Library of Congress*

## 7. RECOGNITION

### EXPRESSING THE LIBRARY'S GRATITUDE

Everyone appreciates thanks for a job well done. Recognition of their effort helps keep most volunteers coming back. Your volunteers may have originally joined the program with the idea that they would be participating in a worthwhile program and helping to share the enjoyment of reading. But it is easy for volunteers to lose sight of their original motives once the work starts. Recognition says, simply, "you and what you do are important to us as well as to the people we serve." Although volunteers frequently protest that they don't expect a pat on the back, and some don't even appear at awards ceremonies, still make the effort. Everyone responds to "thank you!"

Staff who work with volunteers need recognition, too, for helping make the program a success. Many of the informal techniques used with volunteers can also be adapted for library personnel, but formal appreciation of staff effort must be accomplished in a career-related manner.

Although everyone involved in a volunteer program usually agrees that personal recognition is important, mechanisms for instituting it are often omitted from program planning and implementation. An activity as simple as sending birthday cards must be systematized and delegated if it is to work reliably. Include plans for volunteer recognition in your agenda and follow through with them.

### VOLUNTEER RECOGNITION

#### Use Both Formal and Informal Recognition

There are two types of recognition: formal recognition, which centers around special events and awards; and informal recognition, which should occur daily. Formal recognition includes volunteer dinners, awards ceremonies, certificates or service pins, letters from VIPs, and press releases. Informal recognition consists of smiles, greetings, personal thanks, small treats, and even positive criticism. Both types of recognition are important. The former gives volunteers a chance to celebrate themselves, to see themselves as a team that makes a contribution. The latter makes individuals feel valued and worthwhile each time they come to the library.

## Plan Formal Methods of Recognition

The library should recognize all volunteer efforts. In addition to the formal recognition received by every volunteer, develop a system of rewards based on level of effort. Strategies for rewarding volunteers, formally and publicly, must be carefully thought out, not just for the year ahead, but farther into the future. Loyal volunteers will log a lot of hours over the next few years. You need a formal recognition system that is fair, logical, and economical. A system that doesn't build logically or that varies drastically in quality from year to year is not likely to be taken seriously by volunteers or staff.

### Build Rewards Systematically

Libraries with existing programs are in a good position to analyze volunteer trends and project them into the future. If you are initiating or revitalizing your volunteer program, you may have to exercise some imagination about future contributions.

The most sensible way to design the increments for volunteer recognition is to estimate the annual contribution of your "star" volunteer. Then, range levels of effort deserving of recognition down from that point. You can also project what an "average" volunteer will contribute by hypothesizing (or analyzing, if you already have a recognition system) a weekly effort of a certain number of hours over forty-eight or fifty weeks. How many of your volunteers will hit that average? How many will appear much less frequently?

If you decide that 200 hours a year is average, and deserving of a certain type of award, then you may decide to do something special for the volunteer who logged 400 hours. Those who put in only 100 hours might get a different certificate. In any case, you must decide where to make your "breaks" in types of recognition within each year.

In addition to yearly recognition, plan your system to be cumulative. The volunteer who donates 1,000 hours over the course of several years of service to the library is deserving of very special recognition.

### Apply Fairness and Restraint

The previous section discussed the necessity for tying recognition to the degree of effort contributed. Although most volunteers are not overly concerned with formal recognition, they will notice whether it is handed out fairly. Fairness is a relatively simple matter at the outset of a program because, unless one or two individuals donate an enormous number of hours, everyone can be given an equivalent amount of recognition. It is only as the program grows and matures that distinctions among volunteers become apparent.

Resist the temptation to do something truly grand for an outstanding volunteer the first year. A flamboyant reward may be a hard act to follow, and you will have to follow it. What will you do at 500 hours, if you treated a 200-hour volunteer to dinner at the best restaurant in town? Start small. Most library budgets demand thriftiness anyway.

**Use Care In Making Changes**

As your volunteer program matures, its recognition strategies are likely to change. The number of volunteers, their cumulative history, and the complexity of the program may all work to change the level of contribution to which volunteers aspire. Such changes, however, must not appear arbitrary. It is unfair to change the rules for attaining a certain type of award somewhere in the middle of the year. Make such adjustments at the beginning of a new year, or after the awards ceremony has been held, and communicate the new rules clearly.

While most volunteers are not in service to collect pins, certificates, or other gifts, they do appreciate the gesture. These gifts and awards represent something to them: a concrete demonstration that their efforts are appreciated. It is suitable that they can expect such rewards, for that is a sign that they feel comfortable "belonging" to the library. Thus, because of the important symbolic content, awards should never be handled in a thoughtless or arbitrary way.

**Keep Careful Records**

Records that are used to document achievement must be kept very carefully. (Record keeping was discussed in Chapter 5.) There are always volunteers who keep private track of their contributions, and discrepancies can often create bad feelings. Thus, accuracy is important.

**Recognize Volunteers through Special Events**

Libraries across the country have been extremely creative about the special events they have designed to recognize volunteers. Some promote the events widely with radio publicity, press releases, and formal dinners with VIP speakers and ceremonial awards presentations. Others keep events relatively low-key; for example, picnics, outdoor concerts, and other kinds of entertainment. These events say, both to the public at large and to the volunteers, "you are a special team of important, valuable people."

Big expenditures are unnecessary. The care and style you put into planning an event is what is important. Volunteers respond to thoughtfulness more than anything else. You know your volunteers. What would they enjoy? Think of a few possibilities and discuss it with them.

And remember, although awards are given out only once a year, enthusiastic volunteers may enjoy social get-togethers much more often than that. Such team-building events should be strongly encouraged by the library.

The following is a list of just a few of the many creative events used to honor volunteers:

- Halloween and costume parties
- Holiday parties
- Library decorating get-togethers
- Speakers on special topics
- Book and author luncheons
- National Volunteer Week activities
- Volunteer of the Month/Volunteer of the Year presentations

**Give Awards and Rewards**

Tokens of gratitude for the valuable time they contribute are prized by most volunteers, even those who won't admit it. There are various types of awards and rewards, many of which are relatively inexpensive:

- Handsomely lettered certificates are common and can be created by a local artist or calligrapher. A generic certificate can be printed on nice parchment-style paper, and the names of volunteers and the number of hours can be typed in or hand lettered. To recognize special contributions of volunteers, libraries may request certificates of appreciation or letters of commendation from NLS staff. Three certificates to note significant contributions are available: one for general volunteers, another for individual Telephone Pioneers, and the third for Telephone Pioneer chapters. The three types of certificates available from NLS are illustrated on the following pages.

- Service pins are also popular; general volunteering pins that feature years of service are available at low cost through Volunteer--The National Center and other national volunteer organizations. Some libraries choose to have pins manufactured specifically for their programs. While this is costlier, it may be warranted where a program is large and the library budget can afford it.

- Premiums of the kind seen on public television pledge campaigns can be adapted for the volunteer program. Possible gifts include specially designed scarves, t-shirts, umbrellas, hats, mugs, desk sets, and other items, all of which can be inscribed with volunteer-related insignia.

- Letters from the mayor or governor honoring volunteers who have contributed a bench mark number of hours are memorable awards. This keepsake can be given to volunteers in addition to awards given by the library.

- Libraries can give "perks" to volunteers, such as staff privileges on copy machines, free parking, use of staff bathrooms and lounges, free refreshments, free computer time, public library benefits such as no fines, free reserves on books, and the first crack at new books.

- Many libraries give volunteers special badges that bear their names.

## Apply Informal Recognition Regularly and Generously

### Give Positive Feedback Every Day

This is an important area in which to train staff, and you must be acutely aware of your own performance, too. Paid staff represent the library and the people it serves to volunteers, so you should consistently say "thank you" in many different ways. This sincerely expressed courtesy is one of the practices that will keep your volunteers loyal.

There are many organizations that need volunteers. Most people will be drawn to those where the atmosphere is friendly, caring, warm, and courteous. A place that does not cultivate these qualities is going to have trouble keeping its volunteers. How much recognition is enough? Volunteers should get a bit <u>at least</u> every time they appear at the library.

A smile, a hello, and a personal comment or short chat is due every volunteer. In addition, positive conversations about the work, compliments for a job well done, comments addressed informally to a group about a patron's enjoyment, all constitute the type of feedback that brings volunteers back for more.

In grateful appreciation to

for valuable services rendered
in support of the national
free library program for blind and
physically handicapped readers

*National Library Service*
*for the Blind and*
*Physically Handicapped*

*The Library of Congress*

Director

In grateful appreciation to

of the

*Telephone Pioneers of America*

for dedicated service through
the Talking-Book Machine-Repair Program

*National Library Service*
*for the Blind and*
*Physically Handicapped*

*The Library of Congress*

Director

(Actual size 8½ x 11)

In grateful appreciation to

of the

*Telephone Pioneers of America*

for dedicated service through
the Talking-Book Machine-Repair Program

***National Library Service***
***for the Blind and***
***Physically Handicapped***

***The Library of Congress***

Director

(Actual size 14 x 11)

**Be Creative, Caring, and Consistent**

The paradox of volunteer recognition, formal or informal, is that while volunteers deny that recognition is their primary motivation, they are not particularly happy when it's lacking. There are many ways of communicating that you care, as illustrated in the following list, which combines both formal and informal methods of recognition. Make a conscientious attempt to greet the tenth volunteer you see each day with the same enthusiasm you gave the first. It is up to you and your fellow staff members to have a good attitude towards each person's contribution.

**Other Ways to Recognize Volunteers**

- Smile!
- Put up a volunteer suggestion box
- Treat to a soda
- Reimburse assignment-related expenses
- Ask for a report
- Send a birthday card
- Arrange for discounts
- Give service stripes
- Maintain a coffee bar
- Plan annual ceremonial occasions
- Invite to staff meeting
- Be pleasant
- Use in an emergency situation
- Post Honor Roll in reception area
- Give informal teas
- Say "Good Morning"
- Greet by name
- Make thorough pre-arrangements
- Persuade "personnel" to equate volunteer experience with work experience
- Recommend to prospective employer
- Provide scholarships to volunteer conferences and workshops
- Offer advocacy roles
- Utilize as consultants
- Write thank you notes
- Invite participation in policy formation
- Surprise with coffee and cake
- Celebrate outstanding projects and achievements
- Nominate for volunteer awards
- Have a "Presidents Day" for new presidents of sponsoring groups
- Provide substantive in-service training
- Say "Good Night"
- Plan staff and volunteer social events

- Award plaques to sponsoring group
- Give additional responsibility
- Allow participation in team planning
- Respect sensitivities
- Enable to grow on the job
- Enable to grow out of the job
- Send newsworthy information to the media
- Have a wine and cheese tasting party
- Ask patrons to evaluate their service
- Have a picnic
- Conduct community-wide cooperative, inter-agency recognition events
- Say "Good Afternoon"
- Create pleasant surroundings
- Welcome to staff coffee breaks
- Enlist to train other volunteers
- Comment to supervisory staff
- Have a public reception
- Say "Thank You"
- Rent billboard space for public recognition
- Provide opportunities for conferences and evaluation
- Send impromptu fun cards
- Plan occasional extravaganzas
- Utilize purchased newspaper space
- Promote a "Volunteer-of-the-Month" program
- Send a letter of appreciation to employer
- Plan a "Recognition Edition" of the agency newsletter
- Color code name tags to indicate particular achievements (hours, years, unit, etc)
- Send commendatory letters to prominent public figures
- Say "We Missed You"
- Praise the sponsoring group or club
- Distinguish between groups and individuals in the group
- Award special citations for extraordinary achievements
- Send holiday cards
- Plan a theater party
- Attend sports events
- Take time to talk

(Adapted from a list by Vern Lake, Volunteer Services Consultant, Minnesota Department of Public Welfare)

## STAFF RECOGNITION

"Volunteers work for love, and staff work for money." That's the way many managers see the situation when it's time to hand out recognition. But staff who train and work with volunteers are giving an extra measure of energy and responsibility to the library, and they deserve to be acknowledged for it.

Many librarians have found that what will make or break your volunteer program in the long run is the way the staff work with the volunteers. Library personnel, especially those with little managerial experience or insight, may come to resent stepping back while volunteers take the bows and get positive feedback. Staff, too, need formal and informal recognition.

On Volunteer Recognition Day, when awards are given and names named, don't forget the staff who have supported these successes. Thank the staff in general for their counsel and guidance and--in cases where a staff member has worked closely with a particular group or individual volunteer--mention that staff member's name, too. Certificates are unnecessary and probably inappropriate, but staff members appreciate knowing that you and top managers notice their contribution.

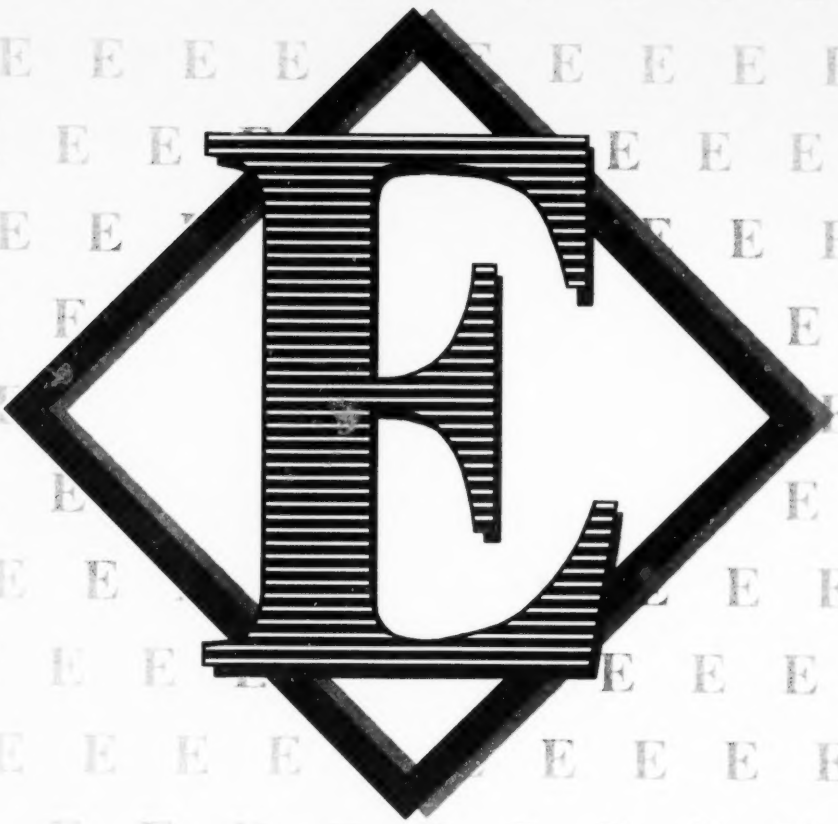
On a day-to-day basis, thank staff sincerely for their effort. Reward positive and helpful attitudes. One way this can be done is to discuss with staff which aspects of their own jobs they would like to and can delegate to volunteers. Everyone has duties they just don't enjoy, and the ability to delegate them is an added benefit for staff who spend a generous amount of time supervising volunteer effort.

Another approach for rewarding staff is to commend them to library administrators. Write a letter or memo describing the staff member's contribution and the difference it has made to you, the volunteers, and the quality of service the library can provide. A copy of the memo should be placed in the employee's personnel file to acknowledge the contribution when the time for evaluation and review arrives. It is important that supervisors know about the effort of certain staff members with respect to the volunteer program. Even if you <u>are</u> their manager, occasional notes to the file will help refresh your own memory when it is time for the annual review.

## YOU ARE RESPONSIBLE FOR MORALE

If the whole concept of recognition sounds like a heavy responsibility--it should! It is hoped that you can undertake it with a spirit of generosity, good humor, and fun, but it is serious business. Staff and volunteers alike will look to you to set the tone. You must keep morale high and support others as much as possible. It is a demanding job, but its rewards are a happy, productive volunteer team and a cooperative, fulfilled staff.

# EVALUATION 8





*National Library Service*
*for the Blind and*
*Physically Handicapped*

*The Library of Congress*

## 8. EVALUATION

### THE CHALLENGE OF EVALUATION

Evaluation is a challenging subject for a variety of reasons. First, the concept of evaluation presupposes that you know what you want from your program, and that you can devise an objective way of measuring progress before you begin. Second, evaluation implies judgment and assessment. You may not want the responsibility of evaluating others or fear having your own performance and ideas assessed. Third, evaluation implies change. What are you going to do about a situation if evaluation reveals problems, mistakes, or poor performance? It can be difficult to modify a program's direction and momentum, and many people would rather not even try.

Stop worrying! If you are just starting a volunteer program, you can't know exactly what's going to work, or just how volunteers are going to perform. Set the goals you would like to realize, work hard to make them happen, and observe the results. Experience will soon show you how realistically you set your sights. Evaluation is an opportunity to correct your course before precedent is established.

If you are concerned about the judgmental aspect of evaluation, remember that the more objective guidelines you have for evaluating performance, the clearer and easier the process is. Both personal and program performance can be evaluated in a positive, constructive way, if agreed-upon goals and the quality of library service are the driving forces behind the assessment.

Evaluation is a valuable tool. Timely, regular results can be used to improve program performance and evaluation reports provide excellent support if you want to expand your program or request more funding. The sections that follow discuss evaluation planning and the mechanics of evaluating both volunteers and the program as a whole. The benefits of this process to volunteers and staff are also described.

## EVALUATION PLANNING

### Set Goals

As mentioned above, many people avoid evaluation because they find it difficult to decide what they want out of their program and how to go about measuring whether they're getting it. The best programs are the ones where periodic assessments are made to monitor performance and make course corrections. However, if you don't set standards for evaluation when you begin a program or an expansion project you will have no tools with which to measure success later. Evaluation planning must be an integral part of the program's initial planning efforts.

You must set goals to determine whether the volunteer program is meeting them. Goals were discussed in Chapter 1 on program planning. They can be large or small in scope, but they must be specific. Goals can involve recruitment, number of things accomplished at the library, number of books inspected or tapes produced, number of new patrons brought in, and a host of other concerns. If you are not sure of what your goals should be, take heart in the knowledge that even a simple goal is better than none at all. Targets can always be revised as activities take shape.

### Involve Staff and Administrators

As with other program planning activities, it is important to get the input of people who will be working with you. Ask administrators what they are interested in learning about the program so that you can devise methods for tracking and assessing relevant information. Find out from staff how much time and interest they are willing to commit to observing and monitoring the program and volunteer performance. How much do they want to be involved in the evaluation itself?

There can be many different people involved in evaluation activities. For each area of assessment you decide to undertake (see following section), decide which combination of evaluators would make the most effective assessment. Possibilities include:

- Volunteer coordinator or program manager
- Staff supervisors of volunteers
- Financial staff (to provide cost-effectiveness viewpoint)
- Volunteers
- Administrators, other staff members, and patrons (if applicable)

For example, will you be the only one to evaluate volunteers, or will staff supervisors participate? Will they actually conduct an evaluation personally, or brief you on their perspectives before you review the volunteer's performance?

## Decide What to Evaluate and How

There are three basic components of a volunteer program that are open for evaluation: the individual volunteers, the volunteer coordinator or project manager, and the progress or success of the program itself.

For each of these evaluation components you must devise criteria for performance and techniques for measuring it. In assessing volunteers, for example, you might want to use criteria like success in discharging job responsibilities, attitude, punctuality, and reliability. Techniques for evaluating volunteers would include the mechanics of evaluation, such as notes to the file, personal interviews, and follow-up. Likewise, the volunteer coordinator must be assessed not only in light of the successful accomplishment of duties, but how well coordinated the effort is, how well managed, and how cost-effective. The program itself must be assessed against the goals set for it, and can be evaluated not only by participants, but by patrons as well. These ideas are expanded upon later in this chapter. Each program is unique, and the best ways to evaluate a program depend upon the way the program is run.

If your program is small, you can "keep your ear to the ground" informally to see how your volunteers are doing. If your program is complex, you may have to get formal briefings from staff supervisors on volunteer successes and problems. No matter what approach you take, make evaluation a part of your program from the start.

## Determine How Often to Evaluate

Volunteers and the volunteer program should be evaluated once a year. Rarely does a volunteer coordinator have the time or energy to perform reviews more frequently than that. However, gathering the data to support annual evaluations should be an on-going process. Some libraries evaluate their training programs on a more frequent basis so that training and orientation sessions can be modified as needed in a timely manner.

Establish some interim goals for monitoring program progress throughout the year. A quick look at achievement should be taken at mid-year at least, and preferably quarterly. You may find places where subtle corrections will ward off potential problems. Also, if your program has only casual support from administrators and staff, it may be unwise to wait until the end of the year to take stock of its success. You may be able to boost support for the program by briefing staff on program accomplishments to date.

Make sure everyone knows the schedule for volunteer evaluation. Some volunteer managers find it convenient to designate a month in which to conduct everyone's evaluations, others prefer to stagger them throughout the year, conducting each one on the particular volunteer's "anniversary date." It is important to respect these schedules. Volunteers whose evaluations aren't held on time may feel slighted or alarmed that their evaluations will be poor.

You are less likely to procrastinate about evaluations and more likely to do them promptly, if you keep the process simple. Personal evaluations need not take more than ten minutes. If you find they are lasting longer, try a different approach.

## Document Your Decisions in a Written Plan

Your evaluation plan can be as simple or as complex as you choose to make it, but it must pose three clear questions for each aspect you choose to evaluate:

- What is your definition of success (your goal)?
- How will you measure success?
- How frequently will you assess the activity?

Organize your ideas in the evaluation plan. A chart and schedule can portray this process very clearly (see sample on the following page).

Document similar plans for assessing the volunteer coordinator and individual volunteers. Commit to keeping evaluation positive and meaningful. Indeed, your plan should contain ideas for incorporating your findings into program planning for the next year.

SAMPLE EVALUATION PLAN FOR ONE PROGRAM CATEGORY

**Book Inspection Plan**

Goal(s): Create a new volunteer book inspection team
Have thirty inspectors on the job by end of the year

**Progress Reports**

- Are seven new inspectors on the job by the end of the first quarter? (To be reported at end of first quarter.)
- Are fifteen new inspectors on the job at mid-year? (To be reported at end of the second quarter.)
- Are they being adequately trained? (To be reported one month after initial training sessions.)
- Is recruitment providing an adequate pool from which to train the inspectors? (To be reported at end of first quarter.)
- Evaluate good performance of first fifteen inspectors. (To be reported during annual volunteer evaluations.)
- Interview twenty patrons for service satisfaction. (To be reported during annual program evaluations.)

Use this type of written plan to guide your interim assessments throughout the year. Collate a list of items that need your attention each month and schedule them on your calendar.

## EVALUATING VOLUNTEERS

Most volunteers appreciate and seek out evaluation of their work. Thoughtful, constructive assessment is a kind of recognition of the worth of individuals and their work. Being reviewed regularly will communicate to volunteers that the library cares about the direction and guidance of its workers. Volunteers should understand that reviews are opportunities to discuss aspirations, accomplishments, and problems, and that the discussion is intended to be mutual, supportive, and educational.

Your attitude toward volunteer evaluation should be that everyone wants to do the best job they can in service to the library's patrons, and that you want to hear volunteers' suggestions about ways to accomplish that mission. If you follow this advice, and give plenty of "strokes" in your evaluations where they're due, people will begin to appreciate and anticipate their reviews. No evaluation should be completely negative, because any serious misconduct by a volunteer should be dealt with as soon as it becomes clear the situation is not going to right itself. Never wait until evaluations to deal with problem volunteers.

### Recognize Your Volunteers' Rights

### Appraise Them on Performance

Volunteers have a right to know if their performance is less than satisfactory and to be given a chance to improve. Don't be surprised to discover that people honestly don't realize that they're doing something wrong. Stay objective and focus on the volunteer's performance, not his or her personality. State the problem, describe why it's a problem (in terms of the library's interests or better volunteer harmony), recommend corrective action, and ask for the volunteer's opinion.

Of course, it is pleasant to be able to give praise to especially worthy volunteers. Everyone likes to be told he or she is doing a good job. In evaluating exceptional volunteers, explore ways in which the person can advance. A good volunteer is often able to recognize similar potential in others. Suggest that these volunteers recommend someone to take over their current responsibilities while they move on to new projects.

**Evaluate against Clear Standards**

For evaluations to be fair, everyone must know the rules in advance. Write your job descriptions clearly, so that good performance means meeting the work duties as they are described. If you have general guidelines of conduct (punctuality, appearance, standards for reliability), make sure everyone gets a copy and post the rules in the volunteer area. Then remind groups of volunteers periodically that the quality of their specific tasks and the cooperation they show in complying with rules of conduct will be the basis upon which they will be evaluated. Encourage volunteers to ask you or other staff members if they aren't clear about their responsibilities.

**Make Sure Both Sides Are Heard**

Evaluation should be a two-way street. On one hand, volunteers have the right to hear what their supervisors report about them. The person who works the most closely with each volunteer should have considerable say in the evaluation. Only then will its information be accurate and useful. On the other hand, volunteers have the right to be heard and to respond to the contents of the evaluation. If they disagree, they must be permitted to say so, and to tell their side of the story. The volunteer's comments should be entered into the evaluation record.

**Explain the Purpose of Evaluation**

Why should an individual volunteer be concerned about the way their job performance is evaluated? Evaluation has several benefits for the volunteer. Let volunteers know that evaluation:

- Keeps the lines of communication open, so that volunteers know how they're doing and can provide feedback to the library.
- Clarifies whether the volunteer is in the right job--perhaps a different job would be more suitable and provide more opportunity for growth.
- Fosters an air of professionalism.
- Gives the volunteer a private, focused session with the manager, during which problems, suggestions, and observations can be shared.
- Provides a record of performance for volunteers using their experience for future employment outside of the library.

Communicate the benefits of evaluation by distributing a memo to all volunteers after they have been on the job several months. The memo should stress the professional nature of evaluation and its personal benefits and should clearly state the standards the evaluations will use. The timing of the evaluations should also be mentioned.

**Keep the Review Relaxed and Positive**

Put the volunteer at ease from the beginning with a smile and a few personal comments. Try to arrange the interview so that you sit with your volunteer, not behind a desk. Describe the organization of the interview, so the volunteer will be psychologically ready for what's coming. Begin with praise for accomplishments; then note improvements. Move to problems last. State them clearly and politely, while presenting them as opportunities for positive change. (For example, "Our book production depends on using studio time as effectively as possible. Your frequent tardiness means that we often lose valuable recording time. Apparently, it's causing enough of a problem with your colleagues that it was brought to my attention.")

Be clear about the change in behavior you want to see and allow the volunteer to respond. Conclude the interview by asking for comments and suggestions on how the library can function better. This type of wind-up assures that the interview will end constructively. It says that you value the volunteer's opinion, that the individual may not be perfect, but is still important and worthwhile. In addition, you may learn something very useful!

**Follow Up on What You Learn**

If it is feasible to fulfill the requests and address the suggestions of volunteers, do so. You might organize the ideas you've heard throughout evaluation, and announce their resolution at a volunteer meeting. Thank volunteers for all their good ideas, and describe which ones are being implemented or will be implemented, and when. If certain ideas can't be carried out, let people know why, either individually or as a group.

## EVALUATING THE PROGRAM

Evaluating your program is your chance to survey your accomplishments from a relatively objective standpoint. Where are you putting most of your effort and money? Are you getting satisfactory results from them? Perhaps the areas you have been concentrating on are now running well enough that

resources should be shifted to another effort. Have you enhanced library services? Are your volunteers productive and happy? How would staff evaluate the program? What about administrators?

Periodic program evaluation serves several purposes. First, it measures achievement against your original goals and presents an opportunity to refine those goals and make them more realistic. Second, it keeps the entire effort on target. Third, it provides program information of interest to library administrators. Fourth, it helps reveal whether and where additional volunteers, resources, or funds are needed. Fifth, it highlights existing problems and anticipates potential problems.

The general subject of goals, ways to measure success, and the scheduling of evaluation tasks was touched upon briefly at the beginning of this chapter. This final section focuses on how you can get insight into the quality and effectiveness of your program by soliciting input from the people who make it happen--the volunteers themselves.

## Solicit Volunteer Opinion on Program Quality

Asking volunteers to evaluate the program is beneficial to you and the volunteers themselves, as well as to the program. When you ask volunteers to evaluate the program, you:

- Demonstrate that you value their opinions.
- Channel their criticism in a positive way.
- Determine whether volunteers understand program goals and whether they feel they are meeting those goals.
- Assess volunteer job satisfaction.
- Discover volunteer attitudes about your own performance.

Because the collective activities of your volunteers really are the program, it is essential to request their ideas. They are closest to the work and often know the most about it.

## Ask to Be Evaluated Yourself

Are you a good volunteer manager? Can you improve? Your administrator will probably conduct your regular employee evaluation solely on the basis of program effectiveness and not personal effectiveness. Ask your volunteers to evaluate you as a volunteer coordinator. Keep things anonymous, and avoid taking responses too personally. Consensus is what you're looking for. Organize your results; allow yourself to feel great about your good marks; and decide what problem areas you can and should modify.

## Organize Volunteer Responses and Act upon the Results

Ask volunteers to evaluate the program in writing, preferably on an evaluation form. The fact that these documents can be submitted anonymously should encourage frankness. Design the forms so that results are easy to tabulate and information is organized in a consistent way. A sample evaluation form is provided on the following pages.

Make questions as specific as possible--most people can tell whether a form is really soliciting their opinion. Skillfully worded, probing questions give the impression that you do want to know the volunteers' thoughts, and that you're asking for information that can transformed into action. Correct negative perceptions and work to change patterns that aren't popular or effective.

## Calculate Your Return on Investment

Many libraries incorporate return-on-investment statistics into their annual evaluations of the volunteer program. Return-on-investment reports can provide a convenient summary of the effectiveness of your program and valuable support for funding requests.

Two types of return-on-investment reports are the productivity report and the monetary value of volunteer hours report. However, keep in mind that monetary-value reports only show a figure for "what we would have spent if we paid people to do this." They do not put a price tag on the true value of the volunteer program. The true value of the program is represented by the people served and the books produced and distributed, and you can never find a cash value for that!

Use your completed project statistics (see Chapter 5 under Maintain Records) to create a volunteer productivity report. Simply list the numbers and types of volunteer projects completed and the number of hours donated for a one year period. When using this report, stress that these projects would not have been completed without the use of volunteers. Always keep in mind that volunteers are not in the library to replace staff members.

A more complex, but no less valuable type of report is one based on a figure for the cash value of volunteer hours contributed. Many organizations sponsoring volunteer programs use this method to estimate the cost-effectiveness of their programs. Unfortunately, there is no single figure consistently used for these estimates. Some of the most commonly used statistics are featured below. Experiment with the figures and choose which works best for you, taking into account the types of jobs your volunteers perform.

**Minimum Wage**

Many programs use the national minimum wage ($3.35 per hour) for return-on-investment statistics. This figure should be avoided, however, because the comparable worth of tasks performed by volunteers in network libraries is usually much higher than the minimum wage.

**Local Average Income**

An alternative to the minimum wage statistic is to use the local average income for the area serviced by your library. Public officials should be able to provide you with this number.

**Job Equivalence Rates**

Job equivalence rates provide a less convenient but more accurate assessment of volunteer worth. To establish job equivalence rates:

- Determine the salary of a paid employee doing a comparable (but not equal) task.
- Add the dollar amount of the employee's benefits package from the yearly salary. Be sure to add amounts for paid holidays, sick days, and insurance coverage.
- Divide the figure above by 50 to determine the employee's weekly salary.
- Divide the figure above by 40 to determine the employee's hourly salary.

You now have an hourly rate for an equivalent job. The problem with this type of analysis, however, is that different statistics must be worked up for each volunteer job. It takes time to determine comparable worth for every volunteer position and you will have to keep the number of hours separate for each type of job. It also may be difficult to find a comparable job.

**National Volunteer Studies**

There are two different figures currently being used to estimate the value of volunteer efforts nationwide. • Volunteer--The National Center uses $8.00 per hour in its calculations. This figure is an updated version of the figure devised by Dr. Wolozin of the University of Massachusetts. The second figure is found in the most recent survey conducted by the Gallup Organization for the Independent Sector. It estimates that one volunteer hour is worth $9.61.

No matter which of the above figures you decide to use, make sure it is clearly marked on your return-on-investment report. Multiply the total number of volunteer hours worked in your library by the figure or figures you chose. This gives you the cash value of your volunteer effort. Many libraries balance the monetary value of hours donated against the volunteer program's budget expenditures for the year to determine the cost-effectiveness of their program. Don't be discouraged if your program is in the red for a few years. Success takes time and you can make it a future goal to change the cost-effectiveness of your program.

SAMPLE EVALUATION QUESTIONNAIRE

What is your current job? _____

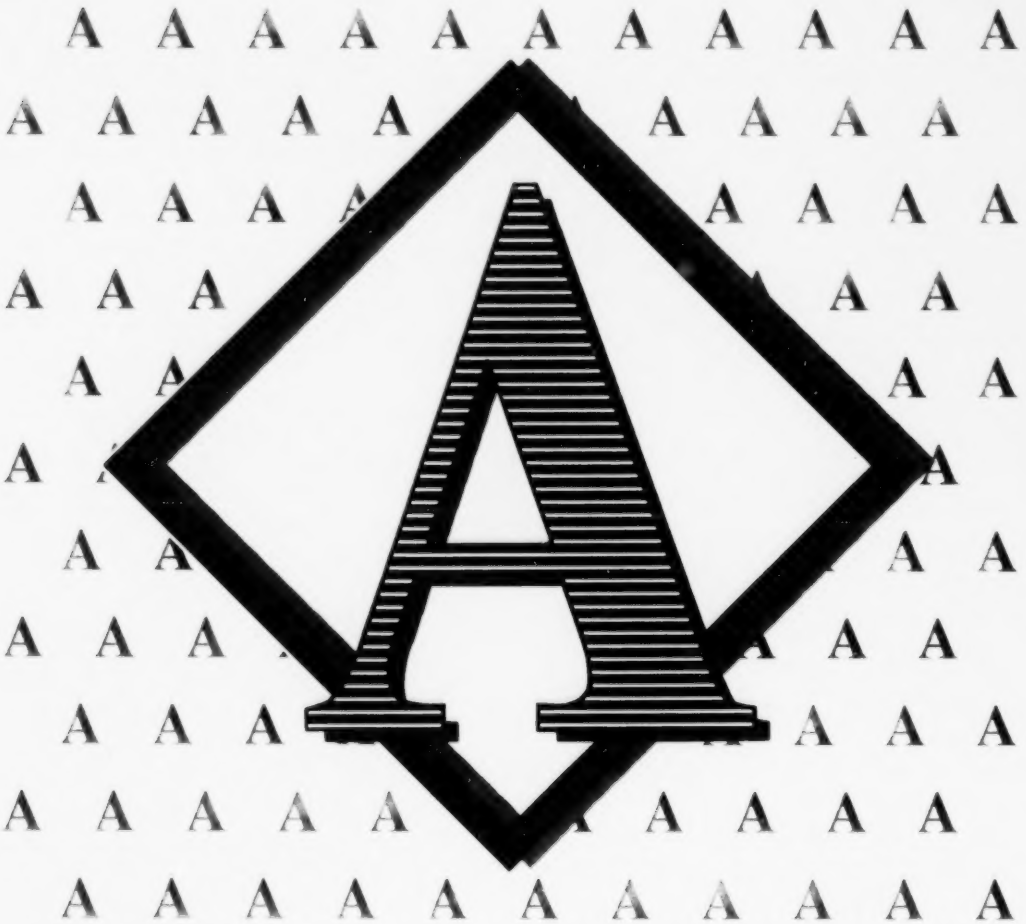
Your supervisor? _____

| | YES | NO |
|---|---|---|
| Do you feel your training prepared you adequately to begin doing the job immediately? | ___ | ___ |
| Did you learn much more on the job? | ___ | ___ |
| Do you understand the ultimate goal of your job in terms of reader service? | ___ | ___ |
| Do you continually feel under pressure to get the job done quickly? | ___ | ___ |
| Do you enjoy the pace of your work? | ___ | ___ |
| Does your job meet your needs from volunteer work? | ___ | ___ |
| Are you personally satisfied with your job? | ___ | ___ |
| Is it: | | |
| Challenging enough? | ___ | ___ |
| Interesting enough? | ___ | ___ |
| Social enough? | ___ | ___ |
| Relaxing enough? | ___ | ___ |
| Meaningful enough? | ___ | ___ |
| Does a positive and cooperative relationship exist with: | | |
| Other volunteers? | ___ | ___ |
| Library staff in general? | ___ | ___ |
| Your supervisor? | ___ | ___ |
| Do you receive adequate recognition for your services: | | |
| On a small everyday basis? | ___ | ___ |
| At volunteer events? | ___ | ___ |
| Are your ideas and suggestions satisfactorily acknowledged? | ___ | ___ |
| Are volunteer events: | | |
| Frequent enough? | ___ | ___ |
| Rewarding enough? | ___ | ___ |

| | YES | NO |
|---|---|---|
| Do you have the perception that your contribution builds toward the goal of serving visually and physically handicapped people? | ___ | ___ |
| Does your supervisor: | | |
| Give clear enough instructions? | ___ | ___ |
| Answer questions willingly? | ___ | ___ |
| Provide too much oversight? | ___ | ___ |
| Are the library's physical surroundings: | | |
| Comfortable enough? | ___ | ___ |
| Adequate? | ___ | ___ |

Comments and suggestions:

# APPENDIX 9



## 9. APPENDIX

### BIBLIOGRAPHY ON VOLUNTEERISM


The Association of Volunteer Bureaus. Standards and Guidelines for the Field of Volunteerism. Arlington, Va.: Volunteer--The National Center, 1978.

Beach, Mark. Editing Your Newsletter: A Guide to Writing, Design, and Production. Ann Arbor, Mich.: North American Students of Cooperation, 1982.

Bortin, Virginia. Publicity for Volunteers: A Handbook. New York: Walker and Co., 1981.

Crimmins, James and Mary Keil. Enterprise in the Nonprofit Sector. New York: American Council for the Arts, 1983.

Flanagan, Joan. The Grass Roots Fundraising Book: How to Raise Money in Your Community. Chicago: Contemporary Books, Inc., 1982.

Flanagan, Joan. The Successful Volunteer Organization: Getting Started and Getting Results in Nonprofit, Charitable, Grass Roots, and Community Groups. Chicago: Contemporary Books, Inc., 1981.

Gordon, Robbie. We Interupt this Program ... A Citizen's Guide to Using the Media for Social Change. Arlington, Va.: Volunteer--The National Center, 1978.

Hanlon, Brenda. The Best of VAL. Arlington, Va.: Volunteer--The National Center, 1980.

Johnson, Robert, David Tobin, and Jessie Bond. Organizing for Local Fundraising: Self-sufficiency for the 80's. Arlington, Va.: Volunteer--The National Center, 1982.

Kaminer, Wendy. Women Volunteering: The Pleasures, Pain and Politics of Unpaid Work from 1830 to the Present. New York: Doubleday and Co., Inc., 1984.

Kotler, Philip. Marketing for Nonprofit Organizations. 2d ed. Englewood Cliffs, N.J.: Prentice-Hall, Inc., 1982.

Lawson, Leslie G., Franklyn Donant, and John Lawson. Lead On! The Complete Handbook for Group Leaders. San Luis Obispo, Calif.: Impact Publications, Inc., 1982.

Lynch, Richard. Precision Management: How to Build and Manage the Winning Organization. Ridgefield, N.J.: Abbott Press, 1985.

MacBride, Marie. Step by Step: Management of the Volunteer Program in Agencies. Arlington, Va.: Volunteer--The National Center, 1979.

McCurdy, William B. Program Evaluation: A Conceptual Tool Kit for Human Service Delivery Managers. New York: Family Service America, 1979.

O'Connell, Brian. America's Voluntary Spirit: A Book of Readings. New York: The Foundation Center, 1983.

Park, Jan Mallory. Meaning Well Is Not Enough: Perspectives on Volunteering. South Plainfield, N.J.: Groupwork Today, Inc., 1983.

Petersen, Shiela W. Successful Community Fundraising. Ottawa, Ill.: Green Hill Publications, 1979.

Rauner, Judy. Helping People Volunteer. Arlington, Va.: Volunteer--The National Center, 1980.

Rossie, Chuck. Media Resource Guide. 3d ed. Los Angeles: Foundation for American Communication, 1983.

Scheier, Ivan H. Exploring Volunteer Space: The Recruiting of a Nation. Arlington, Va.: Volunteer--The National Center, 1980.

Stone, Julita Martinez. How to Volunteer in Social Service Agencies. Springfield, Ill.: Charles C. Thomas Publications, 1982.

Stone, Julita Martinez. How to Work with Groups: Guidelines for Volunteers. Springfield, Ill.: Charles C. Thomas Publications, 1983.

Vineyard, Sue. Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff. Downers Grove, Ill.: Heritage Arts, 1982.

Vineyard, Sue. Finding Your Way Through the Maze of Volunteer Management. Arlington, Va.: Volunteer--The National Center, 1981.

Wilson, Marlene. The Effective Management of Volunteer Programs. Arlington, Va.: Volunteer--The National Center, 1976.

Wilson, Marlene. Survival Skills for Managers. Arlington, Va.: Volunteer--The National Center, 1981.

Wolfe, Joan. Making Things Happen: The Guide for Members of Volunteer Organizations. Arlington, Va.: Volunteer--The National Center, 1981.

These titles may also be purchased from: Volunteer--The National Center, 1111 North 19th Street, Arlington, VA 22209. Telephone: (703) 276-0542.

**SAMPLE JOB DESCRIPTION: VOLUNTEER COORDINATOR**

**Job Title:** Volunteer Coordinator

**Job Description:** Administers all aspects of the volunteer program including planning and development, supervision, and evaluation. Relies on experience and knowledge of the library's goals and objectives, concepts of volunteer administration, and ALA standards for library service and the NLS standards for production of reading materials in recorded and braille formats. Coordinates volunteer activities including braille transcription, recording, book inspection, machine repair, and general library assistance.

**Job Duties:**

1. Evaluate the library's need for volunteer assistance
2. Plan and coordinate development of the volunteer program, which includes writing job descriptions, a volunteer handbook, and other instructional materials
3. Ensure adequate volunteer staffing through recruitment, interviewing, placement, and reassignment of volunteers into appropriate jobs
4. Train volunteers to ensure that jobs are done accurately and completely
5. Supervise all volunteer activities including coordination of activities among areas of the library, work assignment, and maintenance of records
6. Provide formal and informal volunteer recognition
7. Evaluate volunteer program on a regular basis and integrate that information into its further development

**Qualifications:**

1. Bachelor's degree in personnel administration, social work, social sciences, or related field
2. Two years' related experience
3. Knowledge of, or ability to acquire knowledge of, library organization and services, and volunteer management
4. Ability to train and supervise volunteers
5. Ability to communicate effectively orally and in writing

**Supervision:** Supervised by the librarian

SAMPLE JOB DESCRIPTIONS: VOLUNTEER JOBS

**Job Title:** Recorded-Book Inspector

**Job Description:** Ensures that books recorded on cassettes and/or discs are complete and in good condition for circulation to patrons.

**Job Duties:**

1. Inspect incoming books for defective, missing, or misplaced cassettes or discs
2. Rewind cassettes
3. Clean discs of dirt and dust, using proper methods
4. Inspect containers for damage
5. Replace discs or cassettes in proper container, ensuring proper packing
6. Process unrepairable materials appropriately
7. Reshelve books that are in good condition

**Qualifications:**

1. Ability to read container labels
2. Ability to manipulate containers and contents
3. Ability to use players and rewinding equipment
4. Ability to detect the presence of damage to the materials

**Supervision:** Supervised by the volunteer coordinator

**Job Title:** Studio Narrator

**Job Description:** Translates print material into spoken language in a manner that is intelligible and agreeable to the listener.

**Job Duties:**

1. Plan and prepare for effective presentation of material, prior to recording session. This includes determining the style and manner in which material is to be presented, keeping in mind the type of material it is and the intended audience
2. Present the text accurately and intelligibly
3. Write out descriptions for all graphs and charts prior to the recording session, to ensure maximum clarity for all descriptions
4. Find reliable sources for correct pronunciation for names, words, and symbols that are not found in standard reference books
5. Ensure that all announcements, footnotes, and formats are handled in the manner prescribed by NLS technical standard #3
6. Respond well to directions or suggestions from monitor, reviewer, and studio director
7. Consult with the studio director or other designated staff appointed by the studio director concerning difficulties in text preparation

**Qualifications:**

1. Demonstrated ability to pass the library's audition
2. Demonstrated ability to use a dictionary and other reference material
3. Good command of the American English language
4. High degree of discipline, motivation, and thoroughness
5. Ability to read print materials with facility
6. Ability to listen effectively
7. Broad literary background

**Supervision:** Supervised by the studio director

**Job Title:** Studio Monitor

**Job Description:** Operates the recording equipment during a recording session and follows along with the narrator in an identical copy of the text. The role of a monitor is to maintain quality control during a recording session.

**Job Duties:**

1. Ensure that the master recorder is prepared for the recording session
2. Ensure proper recording level at all times (compared against established reference V.U. level) and that the acoustic background is consistent from session to session
3. Ensure that the text is narrated accurately
4. Ensure the consistency and coherence of the narration
5. Ensure that no word fragments or shadows are left in the sound track after a correction has been made
6. Listen for tape drop out, and any other recording problems
7. Ensure that the narrator follows correct procedures for all announcements, footnotes, and format as prescribed by NLS technical standard #3
8. Label all reels and boxes with the information required by NLS technical standard #3
9. Keep all reels of the book together until the text is completed, then turn over the completed tapes to the studio director

**Qualifications:**

1. Ability to read print material with facility
2. Good command of the American English language
3. Ability to listen effectively
4. Ability to communicate effectively
5. Demonstrated ability to use a dictionary and other reference material
6. Broad literary background
7. Demonstrated ability to acquire competence in handling recording equipment
8. Sensitivity to the artistic elements of spoken communication
9. High degree of discipline, motivation, thoroughness, and attention to detail

**Supervision:** Supervised by the studio director

**Job Title:** Audio-Book Reviewer

**Job Description:** Provides quality control in the production of audio-book master recordings by proofing the completed sound track against an identical print copy of the text used by the narrator.

**Job Duties:**

1. Critique the accuracy of the narration against the text
2. Critique the consistency of overall technical quality
3. Critique the artistic elements of the completed recordings
4. Critique the finished sound track to ensure that no word fragments or shadows or any extraneous noise remain in the completed recordings
5. Note clearly all errors found in the sound tracks and where they occur in the text
6. Note clearly any other comment that may improve future performance of the narrator or monitor
7. Ensure that all announcements are narrated according to the requirements of NLS technical standard #3
8. Check to ensure that the labeling of all reels and boxes is according to the requirements of NLS technical standard #3

**Qualifications:**

1. Ability to read print material with facility
2. Good command of the American English language
3. Ability to listen effectively
4. Sensitivity to the artistic elements of spoken communications
5. Demonstrated ability to acquire competence in handling audio playback equipment
6. Broad literary background
7. Demonstrated ability to use a dictionary and other reference material
8. High degree of discipline, motivation, and thoroughness

**Supervision:** Supervised by the studio director

**Job Title:** Equipment Repair Technician

**Job Description:** Repairs playback equipment to ensure that it works properly for use with recorded cassette and disc books

**Job Duties:**

1. Verify identified machine problems
2. Identify any additional or potential problems
3. Use appropriate repair techniques to rectify problems
4. Clean and test equipment to ensure that it works properly
5. Maintain appropriate records of repairs
6. Process repaired and unrepairable equipment properly

**Qualifications:**

1. Ability to detect the presence of operational defects
2. Familiarity with cassette and disc playback equipment
3. Ability to read schematics and appropriate materials
4. Ability to manipulate tools required for repairs
5. Ability to maintain repair records
6. Ability to use volt-ohm meter
7. Ability to solder properly

**Special Requirements:** Requires training provided by the library, using NLS instruction manuals and videotapes

**Supervision:** Supervised by the machine repair coordinator

**Job Title:** Braille Transcriber

**Job Description:** Transcribes requested print materials into braille, meeting given deadlines, and provides needed assistance relating to transcribing services.

**Job Duties:**

1. Transcribe print material accurately into braille according to standardized code and format
2. Correct any errors neatly
3. Prepare braille masters for thermoform process, as necessary
4. Bind and label materials into appropriate format, as necessary

**Qualifications:**

1. Must possess a high school diploma or the GED equivalent
2. Must be certified by the Library of Congress as a literary braille transcriber
3. Must be able to prepare neat and accurate labels and title page

**Supervision:** Supervised by the volunteer coordinator

**Job Title:** Library Assistant

**Job Description:** Provides clerical assistance to various sections of the library.

**Job Duties** (To be performed on an as-needed basis):

1. File, label, and photocopy records and correspondence
2. Collate and package information and materials for mailing
3. Assist reader advisors in processing book requests
4. Assist with library mailings, such as newsletters
5. Assist with seasonal projects, such as weeding the collection of obsolete materials
6. Maintain records of hours for the volunteer program

**Qualifications:**

1. Ability to alphabetize and file records
2. Ability to copy and compute numbers accurately
3. Ability to maintain records of volunteer hours

**Supervision:** Supervised by the volunteer coordinator